## **2024 Industry Awards Finalists, Winners and Honorees**

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Award Category	Company Name	Nomination Name
ADVISOR SUPPORT PLATFORMS		
	Advisory Services Network	Empowering RIAs Platform
	Affiliated Advisors	Let's Grow Program
	Cambridge Investment Group	BridgePort Financial Solutions
	Integrated Partners	Center Stage Educational Platform
	NewEdge Capital Group	Bridge Program
WINNER	RFG Advisory	Advisor Growth Program
	Sanctuary Wealth	Programs and Platforms
ASSET MANAGERS		
Alternative Investments	Amundi US	Pioneer CAT Bond Fund
WINNER	Calamos Investments	Liquid Alternatives Expansion
	DLP Capital	Build-For-Rent Communities
	Spartan Investment Group	Spartan Storage Growth Fund
	StepStone Private Wealth	Global Private Infrastructure Access
	Westmount Partners	Century Park Growth and Income Fund
		,
Charitable Giving/Donor Advised Funds		
WINNER	Fiduciary Trust Company	Philanthropy Services
	U.S. Charitable Gift Trust	
	sponsored by Eaton Vance Management	U.S. Legacy Income Trusts
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Chief Executive Officer of the Year	Carrera Capital Advisors	Keith Nichol
	FS Investments	Michael Forman
WINNER	Guggenheim Investments	Dina DiLorenzo
	Research Affiliates	Chris Brightman
	Schwab Asset Management	Omar Aguilar
	SpiderRock Advisors	Eric Metz
	WisdomTree	Jonathan Steinberg
Chief Marketing Officer of the Year	Allspring	Kelly Vives
	Cohen & Steers	Paul Zettl
WINNER	Columbia Threadneedle	Paul Zettl  Suzanne Lieb
WINNER		
WINNER  Client Experience Initiative	Columbia Threadneedle	
	Columbia Threadneedle Investments	Suzanne Lieb
Client Experience Initiative	Columbia Threadneedle Investments  Janus Henderson Investors	Suzanne Lieb  Edge - Portfolio Construction and Strategy  Onboarding and Compliance Reviews
Client Experience Initiative	Columbia Threadneedle Investments  Janus Henderson Investors  Janus Henderson Investors  John Hancock Investment Management	Suzanne Lieb  Edge - Portfolio Construction and Strategy  Onboarding and Compliance Reviews  Portfolio Insight Tool
Client Experience Initiative	Columbia Threadneedle Investments  Janus Henderson Investors  Janus Henderson Investors  John Hancock Investment	Suzanne Lieb  Edge - Portfolio Construction and Strategy  Onboarding and Compliance Reviews
Client Experience Initiative WINNER	Columbia Threadneedle Investments  Janus Henderson Investors  Janus Henderson Investors  John Hancock Investment Management Northern Trust Asset Management	Edge - Portfolio Construction and Strategy  Onboarding and Compliance Reviews  Portfolio Insight Tool  Investival
Client Experience Initiative	Columbia Threadneedle Investments  Janus Henderson Investors  Janus Henderson Investors  John Hancock Investment Management Northern Trust Asset Management  abrdn	Suzanne Lieb  Edge - Portfolio Construction and Strategy  Onboarding and Compliance Reviews  Portfolio Insight Tool  Investival  Commodities Campaign
Client Experience Initiative WINNER	Columbia Threadneedle Investments  Janus Henderson Investors  Janus Henderson Investors  John Hancock Investment Management  Northern Trust Asset Management  abrdn  Bitwise Asset Management	Edge - Portfolio Construction and Strategy  Onboarding and Compliance Reviews  Portfolio Insight Tool  Investival  Commodities Campaign  Bitcoin Campaign
Client Experience Initiative WINNER	Columbia Threadneedle Investments  Janus Henderson Investors  Janus Henderson Investors  John Hancock Investment Management Northern Trust Asset Management  abrdn  Bitwise Asset Management  Cohen & Steers	Suzanne Lieb  Edge - Portfolio Construction and Strategy  Onboarding and Compliance Reviews  Portfolio Insight Tool  Investival  Commodities Campaign
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Client Experience Initiative WINNER	Columbia Threadneedle Investments  Janus Henderson Investors  Janus Henderson Investors  John Hancock Investment Management Northern Trust Asset Management  abrdn  Bitwise Asset Management  Cohen & Steers  Columbia Threadneedle	Edge - Portfolio Construction and Strategy  Onboarding and Compliance Reviews  Portfolio Insight Tool  Investival  Commodities Campaign  Bitcoin Campaign  Real Estate Roadmap Campaign
Client Experience Initiative  WINNER  Digital Marketing Campaign of the Year	Columbia Threadneedle Investments  Janus Henderson Investors  Janus Henderson Investors  John Hancock Investment Management  Northern Trust Asset Management  abrdn  Bitwise Asset Management  Cohen & Steers  Columbia Threadneedle Investments	Edge - Portfolio Construction and Strategy  Onboarding and Compliance Reviews  Portfolio Insight Tool  Investival  Commodities Campaign  Bitcoin Campaign  Real Estate Roadmap Campaign  Follow the Thread Campaign
Client Experience Initiative  WINNER  Digital Marketing Campaign of the Year	Columbia Threadneedle Investments  Janus Henderson Investors  Janus Henderson Investors  John Hancock Investment Management  Northern Trust Asset Management  abrdn  Bitwise Asset Management  Cohen & Steers  Columbia Threadneedle Investments  FS Investments	Edge - Portfolio Construction and Strategy  Onboarding and Compliance Reviews  Portfolio Insight Tool  Investival  Commodities Campaign  Bitcoin Campaign  Real Estate Roadmap Campaign  Follow the Thread Campaign  Cash on the Sidelines Campaign
Client Experience Initiative  WINNER  Digital Marketing Campaign of the Year	Columbia Threadneedle Investments  Janus Henderson Investors  Janus Henderson Investors  John Hancock Investment Management  Northern Trust Asset Management  abrdn  Bitwise Asset Management  Cohen & Steers  Columbia Threadneedle Investments  FS Investments  Janus Henderson Investors  Nationwide	Edge - Portfolio Construction and Strategy  Onboarding and Compliance Reviews  Portfolio Insight Tool  Investival  Commodities Campaign  Bitcoin Campaign  Real Estate Roadmap Campaign  Follow the Thread Campaign  Cash on the Sidelines Campaign  Brand Campaign
Client Experience Initiative  WINNER  Digital Marketing Campaign of the Year	Columbia Threadneedle Investments  Janus Henderson Investors  Janus Henderson Investors  John Hancock Investment Management  Northern Trust Asset Management  abrdn  Bitwise Asset Management  Cohen & Steers  Columbia Threadneedle Investments  FS Investments  Janus Henderson Investors  Nationwide  BNY Mellon Investment	Edge - Portfolio Construction and Strategy  Onboarding and Compliance Reviews  Portfolio Insight Tool  Investival  Commodities Campaign  Bitcoin Campaign  Real Estate Roadmap Campaign  Follow the Thread Campaign  Cash on the Sidelines Campaign  Brand Campaign
Client Experience Initiative WINNER  Digital Marketing Campaign of the Year  WINNER	Columbia Threadneedle Investments  Janus Henderson Investors  Janus Henderson Investors  John Hancock Investment Management  Northern Trust Asset Management  abrdn  Bitwise Asset Management  Cohen & Steers  Columbia Threadneedle Investments  FS Investments  Janus Henderson Investors  Nationwide	Edge - Portfolio Construction and Strategy  Onboarding and Compliance Reviews  Portfolio Insight Tool Investival  Commodities Campaign Bitcoin Campaign Real Estate Roadmap Campaign  Follow the Thread Campaign  Cash on the Sidelines Campaign  Brand Campaign  Social Security Benefits Campaign  Precision Direct Indexing
Client Experience Initiative WINNER  Digital Marketing Campaign of the Year  WINNER	Columbia Threadneedle Investments  Janus Henderson Investors  Janus Henderson Investors  John Hancock Investment Management  Northern Trust Asset Management  abrdn  Bitwise Asset Management  Cohen & Steers  Columbia Threadneedle Investments  FS Investments  Janus Henderson Investors  Nationwide  BNY Mellon Investment Management	Edge - Portfolio Construction and Strategy  Onboarding and Compliance Reviews  Portfolio Insight Tool Investival  Commodities Campaign Bitcoin Campaign Real Estate Roadmap Campaign  Follow the Thread Campaign  Cash on the Sidelines Campaign  Brand Campaign  Social Security Benefits Campaign
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Client Experience Initiative WINNER  Digital Marketing Campaign of the Year  WINNER  Direct Indexing	Columbia Threadneedle Investments  Janus Henderson Investors  Janus Henderson Investors  John Hancock Investment Management  Northern Trust Asset Management  abrdn  Bitwise Asset Management  Cohen & Steers  Columbia Threadneedle Investments  FS Investments  Janus Henderson Investors  Nationwide  BNY Mellon Investment Management Envestnet  Neuberger Berman	Edge - Portfolio Construction and Strategy  Onboarding and Compliance Reviews  Portfolio Insight Tool Investival  Commodities Campaign Bitcoin Campaign Real Estate Roadmap Campaign  Follow the Thread Campaign  Brand Campaign  Social Security Benefits Campaign  Precision Direct Indexing  Quantitative Portfolios  Custom Direct Investing Program
Client Experience Initiative WINNER  Digital Marketing Campaign of the Year  WINNER  Direct Indexing	Columbia Threadneedle Investments  Janus Henderson Investors  Janus Henderson Investors  John Hancock Investment Management  Northern Trust Asset Management  abrdn  Bitwise Asset Management  Cohen & Steers  Columbia Threadneedle Investments  FS Investments  Janus Henderson Investors  Nationwide  BNY Mellon Investment Management Envestnet Neuberger Berman  Parametric Portfolio	Edge - Portfolio Construction and Strategy  Onboarding and Compliance Reviews  Portfolio Insight Tool  Investival  Commodities Campaign  Bitcoin Campaign  Real Estate Roadmap Campaign  Follow the Thread Campaign  Cash on the Sidelines Campaign  Brand Campaign  Social Security Benefits Campaign  Precision Direct Indexing  Quantitative Portfolios  Custom Direct Investing Program  Fixed Income Direct Indexing
Client Experience Initiative WINNER  Digital Marketing Campaign of the Year  WINNER  Direct Indexing	Columbia Threadneedle Investments  Janus Henderson Investors  Janus Henderson Investors  John Hancock Investment Management  Northern Trust Asset Management  abrdn  Bitwise Asset Management  Cohen & Steers  Columbia Threadneedle Investments  FS Investments  Janus Henderson Investors  Nationwide  BNY Mellon Investment Management Envestnet Neuberger Berman  Parametric Portfolio	Edge - Portfolio Construction and Strategy  Onboarding and Compliance Reviews  Portfolio Insight Tool  Investival  Commodities Campaign  Bitcoin Campaign  Real Estate Roadmap Campaign  Follow the Thread Campaign  Cash on the Sidelines Campaign  Brand Campaign  Social Security Benefits Campaign  Precision Direct Indexing  Quantitative Portfolios  Custom Direct Investing Program  Fixed Income Direct Indexing
Client Experience Initiative WINNER  Digital Marketing Campaign of the Year  WINNER  Direct Indexing  WINNER	Columbia Threadneedle Investments  Janus Henderson Investors  Janus Henderson Investors  John Hancock Investment Management  Northern Trust Asset Management  abrdn  Bitwise Asset Management  Cohen & Steers  Columbia Threadneedle Investments  FS Investments  Janus Henderson Investors  Nationwide  BNY Mellon Investment Management Envestnet Neuberger Berman  Parametric Portfolio	Edge - Portfolio Construction and Strategy  Onboarding and Compliance Reviews  Portfolio Insight Tool  Investival  Commodities Campaign  Bitcoin Campaign  Real Estate Roadmap Campaign  Follow the Thread Campaign  Cash on the Sidelines Campaign  Brand Campaign  Social Security Benefits Campaign  Precision Direct Indexing  Quantitative Portfolios  Custom Direct Investing Program  Fixed Income Direct Indexing
Client Experience Initiative WINNER  Digital Marketing Campaign of the Year  WINNER  Direct Indexing  WINNER  ETFS	Columbia Threadneedle Investments  Janus Henderson Investors  Janus Henderson Investors  John Hancock Investment Management  Northern Trust Asset Management  Cohen & Steers  Columbia Threadneedle Investments  FS Investments  Janus Henderson Investors  Nationwide  BNY Mellon Investment Management Envestnet Neuberger Berman  Parametric Portfolio  Russell Investments	Edge - Portfolio Construction and Strategy  Onboarding and Compliance Reviews  Portfolio Insight Tool Investival  Commodities Campaign Bitcoin Campaign Real Estate Roadmap Campaign  Follow the Thread Campaign  Cash on the Sidelines Campaign  Brand Campaign  Social Security Benefits Campaign  Precision Direct Indexing  Quantitative Portfolios  Custom Direct Investing Program  Fixed Income Direct Indexing  Direct Indexing Product and Education
Client Experience Initiative WINNER  Digital Marketing Campaign of the Year  WINNER  Direct Indexing  WINNER  ETFS	Columbia Threadneedle Investments  Janus Henderson Investors  Janus Henderson Investors  John Hancock Investment Management  Northern Trust Asset Management  Cohen & Steers  Columbia Threadneedle Investments  FS Investments  Janus Henderson Investors  Nationwide  BNY Mellon Investment Management Envestnet Neuberger Berman  Parametric Portfolio  Russell Investments  BondBloxx	Edge - Portfolio Construction and Strategy  Onboarding and Compliance Reviews  Portfolio Insight Tool Investival  Commodities Campaign Bitcoin Campaign Real Estate Roadmap Campaign  Follow the Thread Campaign  Brand Campaign  Social Security Benefits Campaign  Precision Direct Indexing  Quantitative Portfolios  Custom Direct Investing Program  Fixed Income Direct Indexing  Direct Indexing Product and Education  BondBloxx ETFs
Client Experience Initiative WINNER  Digital Marketing Campaign of the Year  WINNER  Direct Indexing  WINNER  ETFS	Columbia Threadneedle Investments  Janus Henderson Investors  Janus Henderson Investors  John Hancock Investment Management  Northern Trust Asset Management  Cohen & Steers  Columbia Threadneedle Investments  FS Investments  Janus Henderson Investors  Nationwide  BNY Mellon Investment Management Envestnet Neuberger Berman  Parametric Portfolio  Russell Investments  BondBloxx  Calamos Investments	Edge - Portfolio Construction and Strategy  Onboarding and Compliance Reviews  Portfolio Insight Tool Investival  Commodities Campaign Bitcoin Campaign Real Estate Roadmap Campaign  Follow the Thread Campaign  Cash on the Sidelines Campaign  Brand Campaign  Social Security Benefits Campaign  Precision Direct Indexing  Quantitative Portfolios  Custom Direct Investing Program  Fixed Income Direct Indexing  Direct Indexing Product and Education  BondBloxx ETFS  Active ETFS
Client Experience Initiative WINNER  Digital Marketing Campaign of the Year  WINNER  Direct Indexing  WINNER  ETFS	Columbia Threadneedle Investments  Janus Henderson Investors  Janus Henderson Investors  John Hancock Investment Management  Northern Trust Asset Management  Cohen & Steers  Columbia Threadneedle Investments  FS Investments  Janus Henderson Investors  Nationwide  BNY Mellon Investment Management Envestnet  Neuberger Berman  Parametric Portfolio  Russell Investments  BondBloxx  Calamos Investments  CNIC Funds	Edge - Portfolio Construction and Strategy  Onboarding and Compliance Reviews  Portfolio Insight Tool  Investival  Commodities Campaign  Bitcoin Campaign  Real Estate Roadmap Campaign  Follow the Thread Campaign  Brand Campaign  Social Security Benefits Campaign  Precision Direct Indexing  Quantitative Portfolios  Custom Direct Investing Program  Fixed Income Direct Indexing  Direct Indexing Product and Education  BondBloxx ETFS  Active ETFS  Electrification ETF
Client Experience Initiative WINNER  Digital Marketing Campaign of the Year  WINNER  Direct Indexing  WINNER  ETFS	Columbia Threadneedle Investments  Janus Henderson Investors  Janus Henderson Investors  John Hancock Investment Management  Northern Trust Asset Management  Cohen & Steers  Columbia Threadneedle Investments  FS Investments  Janus Henderson Investors  Nationwide  BNY Mellon Investment Management  Envestnet  Neuberger Berman  Parametric Portfolio  Russell Investments  Calamos Investments  CNIC Funds  F/m Investments	Edge - Portfolio Construction and Strategy  Onboarding and Compliance Reviews  Portfolio Insight Tool Investival  Commodities Campaign Bitcoin Campaign Real Estate Roadmap Campaign Follow the Thread Campaign  Brand Campaign  Social Security Benefits Campaign  Precision Direct Indexing  Quantitative Portfolios  Custom Direct Investing Program  Fixed Income Direct Indexing  Direct Indexing Product and Education  BondBloxx ETFs  Active ETFs  Electrification ETF  Investible Credit Index

	Janus Henderson Investors	ETF Product Education
	Touchstone Investments	Securitized Income ETF
	VanEck	Digital Asset Education
	VAIILER	Digital Asset Education
Fixed Income	BondBloxx	Corporate Bond ETFs
WINNER	Breckinridge Capital Advisors	Muni Customizations
	Touchstone Investments	Securitized Income ETF
Goals-based Investment Platforms		
WINNER	Nebo Wealth	TAMP and Portfolio Design Platform
	OneAscent Investments	Values-Based Investing Proposal Platform
New Product Development	Amundi US	Pioneer CAT Bond Fund
MANAGER	Fidelity Investments  Hamilton Lane	Disruptive Strategies ETF  Helix
WINNER	Meketa Capital	Infrastructure Fund
	Natixis Investment Managers	Gateway Quality Income ETF
	Simplify	MBS ETF
	Simplify	IVIDS ETT
Real Estate (including REITs)		
WINNER	Cohen & Steers	Real Assets Compass
	DLP Capital	Urban-Core Revitalization REIT
	Hamilton Zanze	Multifamily Educational Campaign
Thought Leadership	Cohen & Steers	Real Estate Roadmap Campaign
WINNER	Franklin Templeton	Alternative Allocations Podcast
	FS Investments	Real Stories from Financial Advisors
	Hamilton Lane	Knowledge Center
	Janus Henderson Investors	Financial Exploitation Educational Program
	Morningstar	The Market Minute
	Nationwide	Social Security Benefits Campaign
	Natixis Investment Managers	Fixed Income Pulse Survey
	Nuveen Investments	Leaders in Lifetime Income
	Research Affiliates Wilmington Trust	Smart Rebalancing Research Paper Emerald GEMS Podcast
	willington must	Lilieralu GLIVIS Foucast
BROKER-DEALERS		
BROKER-DEALERS Chief Executive Officer of the Year	Cabot Lodge Securities	Craig Gould
BROKER-DEALERS  Chief Executive Officer of the Year  WINNER	Cabot Lodge Securities  Park Avenue Securities	Craig Gould  Marianne Caswell
Chief Executive Officer of the Year		
Chief Executive Officer of the Year	Park Avenue Securities	Marianne Caswell
Chief Executive Officer of the Year	Park Avenue Securities	Marianne Caswell
Chief Executive Officer of the Year WINNER	Park Avenue Securities United Planners Financial Services  Cambridge Investment Research  Commonwealth Financial	Marianne Caswell  Michael A. Baker
Chief Executive Officer of the Year WINNER Service	Park Avenue Securities United Planners Financial Services  Cambridge Investment Research Commonwealth Financial Network	Marianne Caswell  Michael A. Baker  Source Social Media Management  Virtual Paraplanning Program
Chief Executive Officer of the Year WINNER Service	Park Avenue Securities United Planners Financial Services  Cambridge Investment Research  Commonwealth Financial	Marianne Caswell  Michael A. Baker  Source Social Media Management
Chief Executive Officer of the Year WINNER Service	Park Avenue Securities United Planners Financial Services  Cambridge Investment Research  Commonwealth Financial  Network  Copper Financial  LPL Financial	Marianne Caswell  Michael A. Baker  Source Social Media Management  Virtual Paraplanning Program  Wealth Management for Credit Unions  High-Net-Worth Services  Advisory Council for Associates and Operations
Chief Executive Officer of the Year WINNER  Service WINNER	Park Avenue Securities United Planners Financial Services  Cambridge Investment Research Commonwealth Financial Network Copper Financial	Marianne Caswell  Michael A. Baker  Source Social Media Management  Virtual Paraplanning Program  Wealth Management for Credit Unions  High-Net-Worth Services
Chief Executive Officer of the Year WINNER Service	Park Avenue Securities United Planners Financial Services  Cambridge Investment Research  Commonwealth Financial  Network  Copper Financial  LPL Financial	Marianne Caswell  Michael A. Baker  Source Social Media Management  Virtual Paraplanning Program  Wealth Management for Credit Unions  High-Net-Worth Services  Advisory Council for Associates and Operations
Chief Executive Officer of the Year WINNER  Service WINNER  BROKER-DEALERS (1,000 Advisors or	Park Avenue Securities United Planners Financial Services  Cambridge Investment Research  Commonwealth Financial  Network  Copper Financial  LPL Financial	Marianne Caswell  Michael A. Baker  Source Social Media Management  Virtual Paraplanning Program  Wealth Management for Credit Unions  High-Net-Worth Services  Advisory Council for Associates and Operations
Chief Executive Officer of the Year WINNER  Service WINNER  BROKER-DEALERS (1,000 Advisors or More)	Park Avenue Securities United Planners Financial Services  Cambridge Investment Research  Commonwealth Financial Network  Copper Financial LPL Financial Raymond James  Ameriprise Financial Cetera Financial Group	Marianne Caswell  Michael A. Baker  Source Social Media Management  Virtual Paraplanning Program  Wealth Management for Credit Unions  High-Net-Worth Services  Advisory Council for Associates and Operations Managers  "Advice Worth Talking About"  Growth Guarantee Campaign
Chief Executive Officer of the Year WINNER  Service WINNER  BROKER-DEALERS (1,000 Advisors or More)	Park Avenue Securities United Planners Financial Services  Cambridge Investment Research Commonwealth Financial Network Copper Financial LPL Financial Raymond James  Ameriprise Financial Cetera Financial Group Kestra Private Wealth Services	Marianne Caswell  Michael A. Baker  Source Social Media Management  Virtual Paraplanning Program  Wealth Management for Credit Unions  High-Net-Worth Services  Advisory Council for Associates and Operations Managers  "Advice Worth Talking About"  Growth Guarantee Campaign  Precision-Targeted Tuck-in Campaign
Chief Executive Officer of the Year WINNER  Service WINNER  BROKER-DEALERS (1,000 Advisors or More) Digital Marketing Campaign of the Year	Park Avenue Securities United Planners Financial Services  Cambridge Investment Research Commonwealth Financial Network Copper Financial LPL Financial Raymond James  Ameriprise Financial Cetera Financial Group Kestra Private Wealth Services Nationwide	Marianne Caswell  Michael A. Baker  Source Social Media Management  Virtual Paraplanning Program  Wealth Management for Credit Unions  High-Net-Worth Services  Advisory Council for Associates and Operations Managers  "Advice Worth Talking About"  Growth Guarantee Campaign  Precision-Targeted Tuck-in Campaign  Social Security Benefits Campaign
Chief Executive Officer of the Year WINNER  Service WINNER  BROKER-DEALERS (1,000 Advisors or More)	Park Avenue Securities United Planners Financial Services  Cambridge Investment Research Commonwealth Financial Network Copper Financial LPL Financial Raymond James  Ameriprise Financial Cetera Financial Group Kestra Private Wealth Services	Marianne Caswell  Michael A. Baker  Source Social Media Management  Virtual Paraplanning Program  Wealth Management for Credit Unions  High-Net-Worth Services  Advisory Council for Associates and Operations Managers  "Advice Worth Talking About"  Growth Guarantee Campaign  Precision-Targeted Tuck-in Campaign
Chief Executive Officer of the Year WINNER  Service WINNER  BROKER-DEALERS (1,000 Advisors or More) Digital Marketing Campaign of the Year  WINNER	Park Avenue Securities United Planners Financial Services  Cambridge Investment Research  Commonwealth Financial Network  Copper Financial LPL Financial Raymond James  Ameriprise Financial Cetera Financial Group Kestra Private Wealth Services Nationwide  Raymond James	Marianne Caswell  Michael A. Baker  Source Social Media Management  Virtual Paraplanning Program  Wealth Management for Credit Unions  High-Net-Worth Services  Advisory Council for Associates and Operations Managers  "Advice Worth Talking About"  Growth Guarantee Campaign  Precision-Targeted Tuck-in Campaign  Social Security Benefits Campaign  Intergenerational Wealth Transfer Campaign
Chief Executive Officer of the Year WINNER  Service WINNER  BROKER-DEALERS (1,000 Advisors or More) Digital Marketing Campaign of the Year	Park Avenue Securities United Planners Financial Services  Cambridge Investment Research Commonwealth Financial Network Copper Financial LPL Financial Raymond James  Ameriprise Financial Cetera Financial Group Kestra Private Wealth Services Nationwide Raymond James  Avantax Wealth Management	Marianne Caswell  Michael A. Baker  Source Social Media Management  Virtual Paraplanning Program  Wealth Management for Credit Unions  High-Net-Worth Services  Advisory Council for Associates and Operations Managers  "Advice Worth Talking About"  Growth Guarantee Campaign  Precision-Targeted Tuck-in Campaign  Social Security Benefits Campaign  Intergenerational Wealth Transfer Campaign  Peer-to-Peer Mentorship
Chief Executive Officer of the Year WINNER  Service WINNER  BROKER-DEALERS (1,000 Advisors or More) Digital Marketing Campaign of the Year  WINNER  Practice Management	Park Avenue Securities United Planners Financial Services  Cambridge Investment Research Commonwealth Financial Network Copper Financial LPL Financial Raymond James  Ameriprise Financial Cetera Financial Group Kestra Private Wealth Services Nationwide Raymond James  Avantax Wealth Management Kestra Financial	Marianne Caswell  Michael A. Baker  Source Social Media Management  Virtual Paraplanning Program  Wealth Management for Credit Unions  High-Net-Worth Services  Advisory Council for Associates and Operations Managers  "Advice Worth Talking About"  Growth Guarantee Campaign  Precision-Targeted Tuck-in Campaign  Social Security Benefits Campaign  Intergenerational Wealth Transfer Campaign  Peer-to-Peer Mentorship  Advisor Fee Pricing Educational Program
Chief Executive Officer of the Year WINNER  Service WINNER  BROKER-DEALERS (1,000 Advisors or More) Digital Marketing Campaign of the Year  WINNER	Park Avenue Securities United Planners Financial Services  Cambridge Investment Research Commonwealth Financial Network Copper Financial LPL Financial Raymond James  Ameriprise Financial Cetera Financial Group Kestra Private Wealth Services Nationwide Raymond James  Avantax Wealth Management	Marianne Caswell  Michael A. Baker  Source Social Media Management  Virtual Paraplanning Program  Wealth Management for Credit Unions  High-Net-Worth Services  Advisory Council for Associates and Operations Managers  "Advice Worth Talking About"  Growth Guarantee Campaign  Precision-Targeted Tuck-in Campaign  Social Security Benefits Campaign  Intergenerational Wealth Transfer Campaign  Peer-to-Peer Mentorship
Chief Executive Officer of the Year WINNER  Service WINNER  BROKER-DEALERS (1,000 Advisors or More) Digital Marketing Campaign of the Year  WINNER  Practice Management	Park Avenue Securities United Planners Financial Services  Cambridge Investment Research Commonwealth Financial Network Copper Financial LPL Financial Raymond James  Ameriprise Financial Cetera Financial Group Kestra Private Wealth Services Nationwide Raymond James  Avantax Wealth Management Kestra Financial	Marianne Caswell  Michael A. Baker  Source Social Media Management  Virtual Paraplanning Program  Wealth Management for Credit Unions  High-Net-Worth Services  Advisory Council for Associates and Operations Managers  "Advice Worth Talking About"  Growth Guarantee Campaign  Precision-Targeted Tuck-in Campaign  Social Security Benefits Campaign  Intergenerational Wealth Transfer Campaign  Peer-to-Peer Mentorship  Advisor Fee Pricing Educational Program
Chief Executive Officer of the Year WINNER  Service WINNER  BROKER-DEALERS (1,000 Advisors or More) Digital Marketing Campaign of the Year  WINNER  Practice Management  WINNER	Park Avenue Securities United Planners Financial Services  Cambridge Investment Research Commonwealth Financial Network Copper Financial LPL Financial Raymond James  Ameriprise Financial Cetera Financial Group Kestra Private Wealth Services Nationwide Raymond James  Avantax Wealth Management Kestra Financial RBC Wealth Management – U.S.	Marianne Caswell  Michael A. Baker  Source Social Media Management  Virtual Paraplanning Program  Wealth Management for Credit Unions  High-Net-Worth Services  Advisory Council for Associates and Operations Managers  "Advice Worth Talking About"  Growth Guarantee Campaign  Precision-Targeted Tuck-in Campaign  Social Security Benefits Campaign  Intergenerational Wealth Transfer Campaign  Peer-to-Peer Mentorship  Advisor Fee Pricing Educational Program  CX360
Chief Executive Officer of the Year WINNER  Service WINNER  BROKER-DEALERS (1,000 Advisors or More) Digital Marketing Campaign of the Year  WINNER  Practice Management  WINNER	Park Avenue Securities United Planners Financial Services  Cambridge Investment Research Commonwealth Financial Network Copper Financial LPL Financial Raymond James  Ameriprise Financial Cetera Financial Group Kestra Private Wealth Services Nationwide Raymond James  Avantax Wealth Management Kestra Financial RBC Wealth Management - U.S.  Kestra Financial	Marianne Caswell  Michael A. Baker  Source Social Media Management  Virtual Paraplanning Program  Wealth Management for Credit Unions  High-Net-Worth Services  Advisory Council for Associates and Operations Managers  "Advice Worth Talking About"  Growth Guarantee Campaign  Precision-Targeted Tuck-in Campaign  Social Security Benefits Campaign  Intergenerational Wealth Transfer Campaign  Peer-to-Peer Mentorship  Advisor Fee Pricing Educational Program  CX360  Digital Account Opening
Chief Executive Officer of the Year WINNER  Service WINNER  BROKER-DEALERS (1,000 Advisors or More) Digital Marketing Campaign of the Year  WINNER  Practice Management  WINNER	Park Avenue Securities United Planners Financial Services  Cambridge Investment Research Commonwealth Financial Network Copper Financial LPL Financial Raymond James  Ameriprise Financial Cetera Financial Group Kestra Private Wealth Services Nationwide Raymond James  Avantax Wealth Management Kestra Financial RBC Wealth Management – U.S.  Kestra Financial LPL Financial	Marianne Caswell  Michael A. Baker  Source Social Media Management  Virtual Paraplanning Program  Wealth Management for Credit Unions  High-Net-Worth Services  Advisory Council for Associates and Operations Managers  "Advice Worth Talking About"  Growth Guarantee Campaign  Precision-Targeted Tuck-in Campaign  Social Security Benefits Campaign  Intergenerational Wealth Transfer Campaign  Peer-to-Peer Mentorship  Advisor Fee Pricing Educational Program  CX360  Digital Account Opening  ClientWorks Rebalancer
Chief Executive Officer of the Year WINNER  Service WINNER  BROKER-DEALERS (1,000 Advisors or More) Digital Marketing Campaign of the Year  WINNER  Practice Management  WINNER  Technology  WINNER	Park Avenue Securities United Planners Financial Services  Cambridge Investment Research Commonwealth Financial Network Copper Financial LPL Financial Raymond James  Ameriprise Financial Cetera Financial Group Kestra Private Wealth Services Nationwide Raymond James  Avantax Wealth Management Kestra Financial RBC Wealth Management - U.S.  Kestra Financial LPL Financial Merrill Wealth Management	Marianne Caswell  Michael A. Baker  Source Social Media Management  Virtual Paraplanning Program  Wealth Management for Credit Unions  High-Net-Worth Services  Advisory Council for Associates and Operations Managers  "Advice Worth Talking About"  Growth Guarantee Campaign  Precision-Targeted Tuck-in Campaign  Social Security Benefits Campaign  Intergenerational Wealth Transfer Campaign  Peer-to-Peer Mentorship  Advisor Fee Pricing Educational Program  CX360  Digital Account Opening ClientWorks Rebalancer  Merrill Video Pro
Chief Executive Officer of the Year WINNER  Service WINNER  BROKER-DEALERS (1,000 Advisors or More) Digital Marketing Campaign of the Year  WINNER  Practice Management  WINNER  Technology  WINNER  Thought Leadership	Park Avenue Securities  United Planners Financial Services  Cambridge Investment Research  Commonwealth Financial  Network  Copper Financial  LPL Financial  Raymond James  Ameriprise Financial  Cetera Financial Group  Kestra Private Wealth Services  Nationwide  Raymond James  Avantax Wealth Management  Kestra Financial  RBC Wealth Management - U.S.  Kestra Financial  LPL Financial  Merrill Wealth Management  Morgan Stanley	Marianne Caswell Michael A. Baker  Source Social Media Management  Virtual Paraplanning Program  Wealth Management for Credit Unions High-Net-Worth Services Advisory Council for Associates and Operations Managers  "Advice Worth Talking About"  Growth Guarantee Campaign  Precision-Targeted Tuck-in Campaign  Social Security Benefits Campaign  Intergenerational Wealth Transfer Campaign  Peer-to-Peer Mentorship  Advisor Fee Pricing Educational Program  CX360  Digital Account Opening ClientWorks Rebalancer  Merrill Video Pro  Al @ Morgan Stanley Assistant
Chief Executive Officer of the Year WINNER  Service WINNER  BROKER-DEALERS (1,000 Advisors or More) Digital Marketing Campaign of the Year  WINNER  Practice Management  WINNER  Technology  WINNER	Park Avenue Securities  United Planners Financial Services  Cambridge Investment Research  Commonwealth Financial Network  Copper Financial LPL Financial Raymond James  Ameriprise Financial Cetera Financial Group Kestra Private Wealth Services Nationwide  Raymond James  Avantax Wealth Management Kestra Financial RBC Wealth Management - U.S.  Kestra Financial LPL Financial Merrill Wealth Management Morgan Stanley  Cambridge Investment Research	Marianne Caswell Michael A. Baker  Source Social Media Management  Virtual Paraplanning Program  Wealth Management for Credit Unions High-Net-Worth Services Advisory Council for Associates and Operations Managers  "Advice Worth Talking About"  Growth Guarantee Campaign Precision-Targeted Tuck-in Campaign Social Security Benefits Campaign  Intergenerational Wealth Transfer Campaign  Peer-to-Peer Mentorship Advisor Fee Pricing Educational Program  CX360  Digital Account Opening ClientWorks Rebalancer Merrill Video Pro  Al @ Morgan Stanley Assistant  Cambridge Stronger Podcast
Chief Executive Officer of the Year WINNER  Service WINNER  BROKER-DEALERS (1,000 Advisors or More) Digital Marketing Campaign of the Year  WINNER  Practice Management  WINNER  Technology  WINNER  Thought Leadership	Park Avenue Securities United Planners Financial Services  Cambridge Investment Research Commonwealth Financial Network Copper Financial LPL Financial Raymond James  Ameriprise Financial Cetera Financial Group Kestra Private Wealth Services Nationwide Raymond James  Avantax Wealth Management Kestra Financial RBC Wealth Management - U.S.  Kestra Financial LPL Financial Merrill Wealth Management Morgan Stanley  Cambridge Investment Research Cetera Financial Group	Marianne Caswell Michael A. Baker  Source Social Media Management  Virtual Paraplanning Program  Wealth Management for Credit Unions High-Net-Worth Services Advisory Council for Associates and Operations Managers  "Advice Worth Talking About"  Growth Guarantee Campaign Precision-Targeted Tuck-in Campaign Social Security Benefits Campaign  Intergenerational Wealth Transfer Campaign  Peer-to-Peer Mentorship Advisor Fee Pricing Educational Program  CX360  Digital Account Opening ClientWorks Rebalancer Merrill Video Pro  Al @ Morgan Stanley Assistant  Cambridge Stronger Podcast  Women's + Employee Research Group
Chief Executive Officer of the Year WINNER  Service WINNER  BROKER-DEALERS (1,000 Advisors or More) Digital Marketing Campaign of the Year  WINNER  Practice Management  WINNER  Technology  WINNER  Thought Leadership	Park Avenue Securities  United Planners Financial Services  Cambridge Investment Research  Commonwealth Financial Network  Copper Financial LPL Financial Raymond James  Ameriprise Financial Cetera Financial Group Kestra Private Wealth Services Nationwide  Raymond James  Avantax Wealth Management Kestra Financial RBC Wealth Management - U.S.  Kestra Financial LPL Financial Merrill Wealth Management Morgan Stanley  Cambridge Investment Research	Marianne Caswell Michael A. Baker  Source Social Media Management  Virtual Paraplanning Program  Wealth Management for Credit Unions High-Net-Worth Services Advisory Council for Associates and Operations Managers  "Advice Worth Talking About"  Growth Guarantee Campaign Precision-Targeted Tuck-in Campaign Social Security Benefits Campaign  Intergenerational Wealth Transfer Campaign  Peer-to-Peer Mentorship Advisor Fee Pricing Educational Program  CX360  Digital Account Opening ClientWorks Rebalancer Merrill Video Pro  Al @ Morgan Stanley Assistant  Cambridge Stronger Podcast
Chief Executive Officer of the Year WINNER  Service WINNER  BROKER-DEALERS (1,000 Advisors or More) Digital Marketing Campaign of the Year  WINNER  Practice Management  WINNER  Technology  WINNER  Thought Leadership	Park Avenue Securities United Planners Financial Services  Cambridge Investment Research Commonwealth Financial Network Copper Financial LPL Financial Raymond James  Ameriprise Financial Cetera Financial Group Kestra Private Wealth Services Nationwide Raymond James  Avantax Wealth Management Kestra Financial RBC Wealth Management - U.S.  Kestra Financial LPL Financial Merrill Wealth Management Morgan Stanley  Cambridge Investment Research Cetera Financial Group	Marianne Caswell Michael A. Baker  Source Social Media Management  Virtual Paraplanning Program  Wealth Management for Credit Unions High-Net-Worth Services Advisory Council for Associates and Operations Managers  "Advice Worth Talking About"  Growth Guarantee Campaign Precision-Targeted Tuck-in Campaign Social Security Benefits Campaign  Intergenerational Wealth Transfer Campaign  Peer-to-Peer Mentorship Advisor Fee Pricing Educational Program  CX360  Digital Account Opening ClientWorks Rebalancer Merrill Video Pro  Al @ Morgan Stanley Assistant  Cambridge Stronger Podcast  Women's + Employee Research Group

Cetera Financial Group	Accesslink
Investments	Purchase and Maintenance Programs
Raymond James	Enhanced Onboarding Support
Axtella	Maria Bethel
	Joan Khoury
oppointent & co.	Journal of the second of the s
lannev Montgomery Scott	Strength and Stability Campaign
	The Power of Oppenheimer Thinking
United Planners Financial Services	"Yes, It's True" Campaign
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United Planners Financial	LEAPS Program
Services	
Bernstein Private Wealth	Double in Transition Amelia
Management	Portfolio Transition Analysis
Janney Montgomery Scott	Advisory Platform Evolution
Rockefeller Capital Management	Premier Digital Client Experience
Axtella	Attracting the Next Generation Campaign
TIAA Wealth Management	Market Trends Investing Education
Bernstein Private Wealth	Tunny Busso
Management	Tuppy Russo
Cresset	Paul Algreen
	Rod Sayegh
_	Inez Louzonis
	Jeff Sippel
	Vikram Chugh
Buckler	Cyber Program Management Platform
Smartria	"Always Audit-Ready" Campaign
Cambridge Investment Research	Ignite "Giving Back" Program
Cambridge Investment Research	The Next Step® Internship
FinServ Foundation	Next Gen Mentorship and Coaching
LPL Financial Foundation	Championing the Next Generation
North Star Resource Group	Financial Literacy Initiatives
United Planners Financial Services	ReachUP Program
Interactive Brokers	Retirement Plan Administration Account
SEI	Community Connect
<b>SEI</b> TradePMR	Community Connect  Advisor Evolution Sciences
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Finding Processing P		Coldstream Wealth Management	Executive Leadership
WINNER   Financial Aliance for Racial Equity   James y Morigamery Statt   Dill MACT Curriemnee   Matternook Retirement Instrusion   Dill MACT Curriemnee   Program   Matternook Retirement Instrusion   More Advisors Campa yn   More Advisors   More Advis		Daylight Advisors	Transforming Lives and Communities
WINER    Equity   HECL Student Conference   Jamey Montgomery yoott   Dismos Marcher Preyam   Montgomer		-	DEI Council Launch
Janey Mortgamery Scott   DELINARCT Conference   Machine School   Machine	WINNER		HBCU Student Conference
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Services Voya Finnada Voya Finn			Women Advisors Campaign
FAMILY OFFICES  Client Initiative  Callan Family Office CY Andreors CY Andreor			Special Needs Planning Symposium
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NOTIFIED   Private Lending Partnership	Client Initiative	Callan Family Office	Family Governance and Education Program
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Concurrent Dakota Wealth Management Peter Raimondi Falcon Wealth Planning Gabriel Shahin Integrated Partners Reebeck Wealth Management Reebeck Wealth Management Reebeck Wealth Management Rebeck Wealth Management Reebeck Wealth Management Reflect Kee Merit Financial Advisors Rick Kent Management Minner Merit Financial Advisors Nemes Rush Family Wealth Management Arthur Ambarik  Charles Nemes  WINNER Perigon Wealth Management Arthur Ambarik  Chief Marketing Officer of the Year Choreo LLC EdgeCo Holdings Chris Broussard Private Advisor Group Verdence Capital Advisors Michele Welsh WINNER Wealthspire Advisors Macel Giombetti  Cerity Partners Gerity Partners JFS Wealth Advisors Masson Investment Advisory Services Women of Wealth Initiative  WINNER NewEdge Wealth Regent Peak Wealth Advisors Schmidt Financial Management Tax Dashboard  Innovator of the Year Alpha Financial Advisors Mercer Advisors Mercer Advisors Mercer Advisors Advisory Portal Advisor	Under \$20 Billion)	·	
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Falcon Wealth Planning Integrated Partners Paul Saganey Keebeck Wealth Management Bruce K. Lee Merit Financial Advisors Rick Kent Nemes Rush Family Wealth Management Perigon Wealth Management Private Advisor Schmidt Financial Advisors Perigon Wealth Management Arthur Ambarik  Chief Marketing Officer of the Year Choreo LLC Marissa Fox-Foley EdgeCo Holdings Chris Broussard Private Advisor Group Kelly Coulter Verdence Capital Advisors Mitchele Welsh WINNER Wealthspire Advisors Angela Giombetti  Client Initiatives Caprock Impact Investing Reporting Platform Cerity Partners Family Office Offering JFS Wealth Advisors Business Growth and Transitions Service Mason Investment Advisory Services  WINNER NewEdge Wealth Onward Entrepreneur Series Regent Peak Wealth Advisors Tailored Client Service Schmidt Financial Management Tax Dashboard  Innovator of the Year Alpha Financial Advisors Ann Reilley, CEO WINNER Amplified Planning Hannah Moore, Founder of The Externship and CEO of Guiding Wealth Capital Investment Advisors Shala Schultz, Director, Product Management I Advisory Portal Transitus Wealth Partners Ross Marino, CEO and Founder  M&A Leader of the Year  Michael Belluomini, Vice President of Mergers and			
Integrated Partners Keebeck Wealth Management Keebeck Wealth Management Merit Financial Advisors Rick Kent Merit Financial Advisors Nemes Rush Farmily Wealth Management MINNER Perigon Wealth Management Arthur Ambarik  Chief Marketing Officer of the Year Choreo LLC EdgeCo Holdings Chris Broussard Private Advisor Group Verdence Capital Advisors Michele Welsh WINNER Wealthspire Advisors Angela Giombetti  Client Initiatives Caprock Impact Investing Reporting Platform Cerity Partners JFS Wealth Advisors Business Growth and Transitions Service Mason Investment Advisory Services Women of Wealth Initiative Winner  NewEdge Wealth Onward Entrepreneur Series Regent Peak Wealth Advisors Schmidt Financial Management Tax Dashboard  Innovator of the Year Alpha Financial Advisors Ann Reilley, CEO Winner, Managing Partner and Senior Investment Advisor Shala Schultz, Director, Product Management   Advisory Portal Transitus Wealth Partners Ross Marino, CEO and Founder Michael Belluomini, Vice President of Mergers and		_	
Merit Financial Advisors Nemes Rush Family Wealth Management  WINNER  Perigon Wealth Management  Chief Marketing Officer of the Year  Choreo LLC  EdgeCo Holdings Private Advisor Group Verdence Capital Advisors  WINNER  Wealthspire Advisors  Angela Giombetti  Client Initiatives  Caprock  Cerity Partners Family Office Offering JFS Wealth Advisors  Mason Investment Advisory Services  WINNER  Wexeldge Wealth  NewEdge Wealth  NewEdge Wealth  Angela Giombetti  Winner  Winner  Capital Advisors  Angela Giombetti  Client Initiatives  Caprock  Impact Investing Reporting Platform  Family Office Offering JFS Wealth Advisors Business Growth and Transitions Service  Women of Wealth Initiative  Winner  Winner  Alpha Financial Management  Tax Dashboard  Innovator of the Year  Winner  Amplified Planning  Capital Investment Advisors Ann Reilley, CEO  Matt Reiner, Managing Partner and Senior Investment Advisor Porduct Management Advisory Portal Advisory Portal Transitus Wealth Partners  Ross Marino, CEO and Founder  Michael Belluomini, Vice President of Mergers and		_	
Nemes Rush Family Wealth Management  WINNER  Perigon Wealth Management  Choreo LLC  EdgeCo Holdings Private Advisor Group Verdence Capital Advisors  WINNER  Wealthspire Advisors  Caprock Cerity Partners JFS Wealth Advisors Mason Investment Advisory Services  WINNER  NewEdge Wealth Regent Peak Wealth Advisors  Tax Dashboard  Innovator of the Year  Amplified Planning  Capital Investment Advisors Mercer Advisors  Mercer Advisors  Mercer Advisors Mercer Advisors  Mercer Advisors Mercer Advisors Mercer Advisors Mercer Advisors Mercer Advisors Mercer Advisors Michael Belluomini, Vice President of Mergers and Michael Belluomini, Vice President of Mergers and		Keebeck Wealth Management	Bruce K. Lee
WINNER  Perigon Wealth Management  Chief Marketing Officer of the Year  Choreo LLC  EdgeCo Holdings  Private Advisor Group  Verdence Capital Advisors  WINNER  Wealthspire Advisors  Cerity Partners  JFS Wealth Advisors  Mason Investment Advisory  Services  WINNER  NewEdge Wealth  Regent Peak Wealth Advisors  Schmidt Financial Management  Innovator of the Year  Amplified Planning  Capital Investment Advisors  Mathe Reiner, Managing Partner and Senior Investment Advisory  Mercer Advisors  Mercer Advisors  Mercer Advisors  Michael Belluomini, Vice President of Mergers and  Michael Belluomini, Vice President of Mergers and		Merit Financial Advisors	Rick Kent
WINNER  Perigon Wealth Management Chief Marketing Officer of the Year  Choreo LLC EdgeCo Holdings Private Advisor Group Verdence Capital Advisors WINNER  Wealthspire Advisors  Caprock Cerity Partners Cerity Partners Mason Investment Advisory Services  WINNER  NewEdge Wealth Regent Peak Wealth Advisors Angela Client Service Schmidt Financial Management  Innovator of the Year  Amplified Planning  Capital Investment Advisors American Advisors American Advisors Amplified Planning  Capital Investment Advisors Mason Reilley, CEO  WINNER  Amplified Planning  Capital Investment Advisors Mercer Advisors Mercer Advisors American Management Advisory Portal Transitus Wealth Partners  Michael Belluomini, Vice President of Mergers and		-	Charles Nemes
EdgeCo Holdings Private Advisor Group Kelly Coulter Verdence Capital Advisors Michele Welsh  WINNER Wealthspire Advisors Angela Giombetti  Client Initiatives Caprock Limpact Investing Reporting Platform Cerity Partners JFS Wealth Advisors Mason Investment Advisory Services Women of Wealth Initiative  WINNER NewEdge Wealth Onward Entrepreneur Series Regent Peak Wealth Advisors Tailored Client Service Schmidt Financial Management Tax Dashboard  Innovator of the Year Alpha Financial Advisors Ann Reilley, CEO  WINNER Amplified Planning Capital Investment Advisors Mercer Advisors Mercer Advisors Transitus Wealth Partners Ross Marino, CEO and Founder Michael Belluomini, Vice President of Mergers and	WINNER		Arthur Ambarik
EdgeCo Holdings Private Advisor Group Kelly Coulter Verdence Capital Advisors Michele Welsh  WINNER Wealthspire Advisors Angela Giombetti  Client Initiatives Caprock Limpact Investing Reporting Platform Cerity Partners JFS Wealth Advisors Mason Investment Advisory Services Women of Wealth Initiative  WINNER NewEdge Wealth Onward Entrepreneur Series Regent Peak Wealth Advisors Tailored Client Service Schmidt Financial Management Tax Dashboard  Innovator of the Year Alpha Financial Advisors Ann Reilley, CEO  WINNER Amplified Planning Capital Investment Advisors Mercer Advisors Mercer Advisors Transitus Wealth Partners Ross Marino, CEO and Founder Michael Belluomini, Vice President of Mergers and			
Private Advisor Group Verdence Capital Advisors Michele Welsh  WINNER Wealthspire Advisors Angela Giombetti  Client Initiatives Caprock Cerity Partners JFS Wealth Advisors Mason Investment Advisory Services Women of Wealth Initiative  WINNER NewEdge Wealth Regent Peak Wealth Advisors Schmidt Financial Management Innovator of the Year Alpha Financial Advisors Amplified Planning Capital Investment Advisors Mercer Advisors Ann Reilley, CEO Minner Mercer Advisors Mercer Advisors Ann Reilley, CEO Guiding Wealth Capital Investment Advisors Mercer Advisors Mercer Advisors Ann Reilley, CEO and Founder Michael Belluomini, Vice President of Mergers and Michael Belluomini, Vice President of Mergers and	Chief Marketing Officer of the Year	Choreo LLC	Marissa Fox-Foley
WINNER  Wealthspire Advisors  Angela Giombetti  Client Initiatives  Caprock Cerity Partners JFS Wealth Advisors Mason Investment Advisory Services  WINNER  NewEdge Wealth Regent Peak Wealth Advisors Schmidt Financial Management Tax Dashboard  Innovator of the Year  Alpha Financial Advisors Amplified Planning  Capital Investment Advisors Mercer Advisors Mercer Advisors Mercer Advisors An Reilley, CEO  Hannah Moore, Founder of The Externship and CEO of Guiding Wealth Capital Investment Advisors Mercer Advisors Mercer Advisors Michael Belluomini, Vice President of Mergers and			
WINNER  Wealthspire Advisors  Angela Giombetti  Client Initiatives  Caprock  Cerity Partners  JFS Wealth Advisors  Mason Investment Advisory Services  Women of Wealth Initiative  WINNER  NewEdge Wealth  Regent Peak Wealth Advisors  Tailored Client Service  Schmidt Financial Management  Innovator of the Year  Alpha Financial Advisors  Amplified Planning  Capital Investment Advisors  Mercer Advisors  Mercer Advisors  Transitus Wealth Partners  Michael Belluomini, Vice President of Mergers and		·	
Client Initiatives  Caprock Cerity Partners JFS Wealth Advisors Mason Investment Advisory Services Women of Wealth Initiative  WINNER  NewEdge Wealth Regent Peak Wealth Advisors Schmidt Financial Management Innovator of the Year  Amplified Planning  Capital Investment Advisors Mercer Advisors Mercer Advisors Mercer Advisors Transitus Wealth Partners  Michael Belluomini, Vice President of Mergers and	WINNER		
Cerity Partners  JFS Wealth Advisors  Mason Investment Advisory Services  WINNER  NewEdge Wealth Regent Peak Wealth Advisors Schmidt Financial Management  Innovator of the Year  Alpha Financial Advisors  Ann Reilley, CEO  WINNER  Amplified Planning  Capital Investment Advisors  Mercer Advisors  Mercer Advisors  Tansitus Wealth Partners  Family Office Offering Business Growth and Transitions Service  Women of Wealth Initiative  Women of Wealth Initiative  Women of Wealth Initiative  Women of Wealth Initiative  Tallored Client Service  Tax Dashboard  Ann Reilley, CEO  Hannah Moore, Founder of The Externship and CEO of Guiding Wealth  Matt Reiner, Managing Partner and Senior Investment Advisor  Shala Schultz, Director, Product Management   Advisory Portal  Transitus Wealth Partners  Ross Marino, CEO and Founder	WINNER	wealthspire Advisors	Angela Glombetti
Cerity Partners  JFS Wealth Advisors  Business Growth and Transitions Service  Mason Investment Advisory Services  Women of Wealth Initiative  Women of Wealth Initiative  Women of Wealth Initiative  Women of Wealth Initiative  Tailored Client Service  Schmidt Financial Management  Tax Dashboard  Innovator of the Year  Alpha Financial Advisors  Ann Reilley, CEO  WINNER  Amplified Planning  Capital Investment Advisors  Mercer Advisors  Mercer Advisors  Mercer Advisors  Transitus Wealth Partners  Michael Belluomini, Vice President of Mergers and	Client Initiatives	Caprock	Impact Investing Reporting Platform
JFS Wealth Advisors Mason Investment Advisory Services  Women of Wealth Initiative  Winner  NewEdge Wealth Regent Peak Wealth Advisors Schmidt Financial Management  Innovator of the Year  Alpha Financial Advisors Ann Reilley, CEO  Winner  Amplified Planning Capital Investment Advisors Mercer Advisors Mercer Advisors Mercer Advisors Mercer Advisors Michael Belluomini, Vice President of Mergers and Michael Belluomini, Vice President of Mergers and Mercer Advisors Michael Belluomini, Vice President of Mergers and			
WINNER  NewEdge Wealth  Regent Peak Wealth Advisors  Schmidt Financial Management  Innovator of the Year  Alpha Financial Advisors  Ann Reilley, CEO  Hannah Moore, Founder of The Externship and CEO of Guiding Wealth  Capital Investment Advisors  Mercer Advisors  Mercer Advisors  Mercer Advisors  Transitus Wealth Partners  Winner  Winner  Mat Reiner, Managing Partner and Senior Investment Advisor Shala Schultz, Director, Product Management   Advisory Portal Ross Marino, CEO and Founder			
WINNER  NewEdge Wealth Regent Peak Wealth Advisors Schmidt Financial Management Tax Dashboard  Innovator of the Year Alpha Financial Advisors Ann Reilley, CEO  WINNER Amplified Planning Capital Investment Advisors Mercer Advisors Mercer Advisors Mercer Advisors Ann Reilley, CEO  Managing Partner and Senior Investment Advisor Shala Schultz, Director, Product Management   Advisory Portal Transitus Wealth Partners  Michael Belluomini, Vice President of Mergers and		•	Women of Wealth Initiative
Regent Peak Wealth Advisors  Schmidt Financial Management  Tax Dashboard  Innovator of the Year  Alpha Financial Advisors  Ann Reilley, CEO  Hannah Moore, Founder of The Externship and CEO of Guiding Wealth  Capital Investment Advisors  Matt Reiner, Managing Partner and Senior Investment Advisor  Mercer Advisors  Mercer Advisors  Transitus Wealth Partners  Michael Belluomini, Vice President of Mergers and	WINNER		Onward Entrepreneur Series
Innovator of the Year  Alpha Financial Advisors  Ann Reilley, CEO  Hannah Moore, Founder of The Externship and CEO of Guiding Wealth  Capital Investment Advisors  Matt Reiner, Managing Partner and Senior Investment Advisor  Shala Schultz, Director, Product Management   Advisory Portal  Transitus Wealth Partners  Ross Marino, CEO and Founder  M&A Leader of the Year  Carson Group  Michael Belluomini, Vice President of Mergers and			
WINNER  Amplified Planning  Capital Investment Advisors  Matt Reiner, Managing Partner and Senior Investment Advisor  Mercer Advisors  Mercer Advisors  Mercer Advisors  Transitus Wealth Partners  Michael Belluomini, Vice President of Mergers and		Schmidt Financial Management	Tax Dashboard
WINNER  Amplified Planning  Capital Investment Advisors  Matt Reiner, Managing Partner and Senior Investment Advisor  Mercer Advisors  Mercer Advisors  Mercer Advisors  Transitus Wealth Partners  Michael Belluomini, Vice President of Mergers and			
CEO of Guiding Wealth  Capital Investment Advisors  Matt Reiner, Managing Partner and Senior Investment Advisor  Shala Schultz, Director, Product Management   Advisory Portal  Transitus Wealth Partners  Ross Marino, CEO and Founder  M&A Leader of the Year  Carson Group  Michael Belluomini, Vice President of Mergers and	Innovator of the Year	Alpha Financial Advisors	Ann Reilley, CEO
Mercer Advisors  Mercer Advisors  Transitus Wealth Partners  Michael Belluomini, Vice President of Mergers and	WINNER	Amplified Planning	CEO of Guiding Wealth
Mercer Advisors Shala Schultz, Director, Product Management   Advisory Portal  Transitus Wealth Partners Ross Marino, CEO and Founder  Michael Belluomini, Vice President of Mergers and		Capital Investment Advisors	
Advisory Portal  Transitus Wealth Partners  Ross Marino, CEO and Founder  M&A Leader of the Year  Carson Group  Michael Belluomini, Vice President of Mergers and		Mercer Advisors	Shala Schultz, Director, Product Management
M&A Leader of the Year  Carson Group  Michael Belluomini, Vice President of Mergers and			
MISSA Leaner of the year Carson Group		mansicus vvedicii Parcilers	NOSS IVIALITIO, CLO ALIA FOULIARI
Acquisitions	M&A Leader of the Year	Carson Group	=
			Acquisitions

	Cradent Wealth Management	David Hofty CEO
	Credent Wealth Management  Edelman Financial Engines	David Hefty, CEO Suzanne van Staveren, EVP, CFO and COO
	Integrated Partners	Robert Sandrew, Chief Growth Officer
		Dave Barton, Vice Chairman and M&A Team
WINNER	Mercer Advisors	Leader
	NewEdge Advisors	Neil Turner, Co-Founder and Co-CEO
	Perigon Wealth Management	Art Ambarik, CEO and M&A Leader
	Wealthspire Advisors	Hoyt Stastney, General Counsel and Head of M&A
Dising Stay of the Very Henevers	Dryn Mauer Capital Management	Andrew N. Davis Head of Macroscopomic Possarch
Rising Star of the Year Honorees	Bryn Mawr Capital Management	Andrew N. Davis, Head of Macroeconomic Research
	Falcon Wealth Planning	Nicky Amore, Managing Director  Jeff Cutler, Chief Experience Officer and Managing
	NewEdge Advisors	Partner
	Snowden Lane Partners	Joseph Raieta, EVP, Head of Investments
	Verdence Capital Advisors	Lucas R. Belanger, Private Wealth Advisor
Thought I and an of the Year	Alaba Cara Maralth Addisan	labour Los Dinastos of Bossouth
Thought Leader of the Year	AlphaCore Wealth Advisory	Johann Lee, Director of Research
	Bailard	Blaine Townsend, EVP, Director, Sustainable, Responsible and Impact Investing
		Matt Reiner, Managing Partner and Senior
	Capital Investment Advisors	Investment Advisor
	Coldstream Wealth Management	Anne Marie Stonich, Chief Wealth Strategist
	Prosperity Capital Advisors	Dave Alison, President and Founding Partner
WINNER	Sanctuary Wealth	Mary Ann Bartels, Chief Investment Strategist
	Strategic Retirement Partners	Deane Mayerhofer
INDUSTRY ASSOCIATIONS		
	Financial Planning Association	Membership Magnet
WINNER	Investments & Wealth Institute	IWI Academy
INDUSTRY RESEARCH PROVIDERS		
	55ip, a subsidiary of J.P. Morgan Asset Management	Tax Harvest Indicator
		Al Financial Research Assistant
	Brightwave  Certified Financial Planner Board	
	of Standards	Actionable Insights Research
	Daylight Advisors	Philanthropic Research
	Devoe & Company	Heart of the Deal
	Diamond Consultants	Advisor Transition Poport
		Advisor Transition Report
	Nasdaq Dorsey Wright	Nasdaq Dorsey Wright Podcast
	Nasdaq Dorsey Wright Research Affiliates	· ·
WINNER	Nasdaq Dorsey Wright	Nasdaq Dorsey Wright Podcast
WINNER	Nasdaq Dorsey Wright Research Affiliates The American College of	Nasdaq Dorsey Wright Podcast Asset Allocation Interactive Tool
WINNER INSURANCE	Nasdaq Dorsey Wright Research Affiliates The American College of Financial Services	Nasdaq Dorsey Wright Podcast Asset Allocation Interactive Tool  Retirement Income Literacy Study  Expanded Research Offerings
	Nasdaq Dorsey Wright Research Affiliates The American College of Financial Services	Nasdaq Dorsey Wright Podcast Asset Allocation Interactive Tool  Retirement Income Literacy Study  Expanded Research Offerings  Envestnet - Access to Annuities via the
INSURANCE	Nasdaq Dorsey Wright Research Affiliates The American College of Financial Services VettaFl	Nasdaq Dorsey Wright Podcast Asset Allocation Interactive Tool  Retirement Income Literacy Study  Expanded Research Offerings
INSURANCE	Nasdaq Dorsey Wright Research Affiliates The American College of Financial Services VettaFl  Envestnet iPipeline	Nasdaq Dorsey Wright Podcast  Asset Allocation Interactive Tool  Retirement Income Literacy Study  Expanded Research Offerings  Envestnet - Access to Annuities via the Insurance Exchange  Annuity Status Tracker  Registered Index-Linked Annuity (RILA) Digital
INSURANCE	Nasdaq Dorsey Wright Research Affiliates The American College of Financial Services VettaFI  Envestnet iPipeline Jackson	Nasdaq Dorsey Wright Podcast Asset Allocation Interactive Tool  Retirement Income Literacy Study  Expanded Research Offerings  Envestnet - Access to Annuities via the Insurance Exchange  Annuity Status Tracker  Registered Index-Linked Annuity (RILA) Digital Ecosystem
INSURANCE	Nasdaq Dorsey Wright Research Affiliates The American College of Financial Services VettaFl  Envestnet iPipeline Jackson Progyny	Nasdaq Dorsey Wright Podcast Asset Allocation Interactive Tool  Retirement Income Literacy Study  Expanded Research Offerings  Envestnet - Access to Annuities via the Insurance Exchange  Annuity Status Tracker  Registered Index-Linked Annuity (RILA) Digital Ecosystem  Women's Health Benefits
INSURANCE WINNER	Nasdaq Dorsey Wright Research Affiliates The American College of Financial Services VettaFI  Envestnet iPipeline Jackson	Nasdaq Dorsey Wright Podcast Asset Allocation Interactive Tool  Retirement Income Literacy Study  Expanded Research Offerings  Envestnet - Access to Annuities via the Insurance Exchange  Annuity Status Tracker  Registered Index-Linked Annuity (RILA) Digital Ecosystem
INSURANCE WINNER  MARKETING   PR FIRMS	Nasdaq Dorsey Wright Research Affiliates The American College of Financial Services VettaFl  Envestnet iPipeline Jackson Progyny Voya Financial	Nasdaq Dorsey Wright Podcast Asset Allocation Interactive Tool  Retirement Income Literacy Study  Expanded Research Offerings  Envestnet - Access to Annuities via the Insurance Exchange Annuity Status Tracker Registered Index-Linked Annuity (RILA) Digital Ecosystem  Women's Health Benefits  Connected Workplace Experiences
INSURANCE WINNER	Nasdaq Dorsey Wright Research Affiliates The American College of Financial Services VettaFl  Envestnet iPipeline Jackson Progyny Voya Financial  Ficomm Partners	Nasdaq Dorsey Wright Podcast Asset Allocation Interactive Tool  Retirement Income Literacy Study  Expanded Research Offerings  Envestnet - Access to Annuities via the Insurance Exchange Annuity Status Tracker Registered Index-Linked Annuity (RILA) Digital Ecosystem Women's Health Benefits Connected Workplace Experiences  Wealth is a Woman's World Campaign
INSURANCE WINNER  MARKETING   PR FIRMS	Nasdaq Dorsey Wright Research Affiliates The American College of Financial Services VettaFl  Envestnet iPipeline Jackson Progyny Voya Financial  Ficomm Partners Idea Decanter	Nasdaq Dorsey Wright Podcast Asset Allocation Interactive Tool  Retirement Income Literacy Study  Expanded Research Offerings  Envestnet - Access to Annuities via the Insurance Exchange Annuity Status Tracker Registered Index-Linked Annuity (RILA) Digital Ecosystem  Women's Health Benefits  Connected Workplace Experiences
INSURANCE WINNER  MARKETING   PR FIRMS	Nasdaq Dorsey Wright Research Affiliates The American College of Financial Services VettaFl  Envestnet iPipeline Jackson Progyny Voya Financial  Ficomm Partners Idea Decanter Intention.ly	Nasdaq Dorsey Wright Podcast  Asset Allocation Interactive Tool  Retirement Income Literacy Study  Expanded Research Offerings  Envestnet - Access to Annuities via the Insurance Exchange  Annuity Status Tracker  Registered Index-Linked Annuity (RILA) Digital Ecosystem  Women's Health Benefits  Connected Workplace Experiences  Wealth is a Woman's World Campaign  Membership Magnet  Advisor Brand Builder
INSURANCE WINNER  MARKETING   PR FIRMS  Digital Campaign of the Year	Nasdaq Dorsey Wright Research Affiliates The American College of Financial Services VettaFl  Envestnet iPipeline Jackson Progyny Voya Financial  Ficomm Partners Idea Decanter	Nasdaq Dorsey Wright Podcast Asset Allocation Interactive Tool  Retirement Income Literacy Study  Expanded Research Offerings  Envestnet - Access to Annuities via the Insurance Exchange  Annuity Status Tracker  Registered Index-Linked Annuity (RILA) Digital Ecosystem  Women's Health Benefits  Connected Workplace Experiences  Wealth is a Woman's World Campaign  Membership Magnet
INSURANCE WINNER  MARKETING   PR FIRMS  Digital Campaign of the Year	Nasdaq Dorsey Wright Research Affiliates The American College of Financial Services VettaFl  Envestnet iPipeline Jackson Progyny Voya Financial  Ficomm Partners Idea Decanter Intention.ly	Nasdaq Dorsey Wright Podcast  Asset Allocation Interactive Tool  Retirement Income Literacy Study  Expanded Research Offerings  Envestnet - Access to Annuities via the Insurance Exchange  Annuity Status Tracker  Registered Index-Linked Annuity (RILA) Digital Ecosystem  Women's Health Benefits  Connected Workplace Experiences  Wealth is a Woman's World Campaign  Membership Magnet  Advisor Brand Builder
INSURANCE WINNER  MARKETING   PR FIRMS  Digital Campaign of the Year  WINNER	Nasdaq Dorsey Wright Research Affiliates The American College of Financial Services VettaFl  Envestnet iPipeline Jackson Progyny Voya Financial  Ficomm Partners Idea Decanter Intention.ly	Nasdaq Dorsey Wright Podcast Asset Allocation Interactive Tool  Retirement Income Literacy Study  Expanded Research Offerings  Envestnet - Access to Annuities via the Insurance Exchange Annuity Status Tracker Registered Index-Linked Annuity (RILA) Digital Ecosystem  Women's Health Benefits Connected Workplace Experiences  Wealth is a Woman's World Campaign Membership Magnet Advisor Brand Builder  Behavior Gap Audience Builder  Changing the Conversation on Race in Wealth
INSURANCE WINNER  MARKETING   PR FIRMS  Digital Campaign of the Year  WINNER  PR Campaign of the Year	Nasdaq Dorsey Wright Research Affiliates The American College of Financial Services VettaFl  Envestnet iPipeline Jackson Progyny Voya Financial  Ficomm Partners Idea Decanter Intention.ly Snappy Kraken  Haven Tower Group	Nasdaq Dorsey Wright Podcast Asset Allocation Interactive Tool  Retirement Income Literacy Study  Expanded Research Offerings  Envestnet - Access to Annuities via the Insurance Exchange Annuity Status Tracker Registered Index-Linked Annuity (RILA) Digital Ecosystem Women's Health Benefits Connected Workplace Experiences  Wealth is a Woman's World Campaign Membership Magnet Advisor Brand Builder  Behavior Gap Audience Builder  Changing the Conversation on Race in Wealth Management
INSURANCE WINNER  MARKETING   PR FIRMS  Digital Campaign of the Year  WINNER  PR Campaign of the Year	Nasdaq Dorsey Wright Research Affiliates The American College of Financial Services VettaFl  Envestnet iPipeline Jackson Progyny Voya Financial  Ficomm Partners Idea Decanter Intention.ly Snappy Kraken	Nasdaq Dorsey Wright Podcast Asset Allocation Interactive Tool  Retirement Income Literacy Study  Expanded Research Offerings  Envestnet - Access to Annuities via the Insurance Exchange Annuity Status Tracker Registered Index-Linked Annuity (RILA) Digital Ecosystem Women's Health Benefits Connected Workplace Experiences  Wealth is a Woman's World Campaign Membership Magnet Advisor Brand Builder  Behavior Gap Audience Builder  Changing the Conversation on Race in Wealth Management Active ETFs for Alternatives
INSURANCE WINNER  MARKETING   PR FIRMS  Digital Campaign of the Year  WINNER  PR Campaign of the Year	Nasdaq Dorsey Wright Research Affiliates The American College of Financial Services VettaFl  Envestnet iPipeline Jackson Progyny Voya Financial  Ficomm Partners Idea Decanter Intention.ly Snappy Kraken  Haven Tower Group Keramas	Nasdaq Dorsey Wright Podcast Asset Allocation Interactive Tool  Retirement Income Literacy Study  Expanded Research Offerings  Envestnet - Access to Annuities via the Insurance Exchange Annuity Status Tracker Registered Index-Linked Annuity (RILA) Digital Ecosystem Women's Health Benefits Connected Workplace Experiences  Wealth is a Woman's World Campaign Membership Magnet Advisor Brand Builder  Behavior Gap Audience Builder  Changing the Conversation on Race in Wealth Management
INSURANCE WINNER  MARKETING   PR FIRMS  Digital Campaign of the Year  WINNER  PR Campaign of the Year	Nasdaq Dorsey Wright Research Affiliates The American College of Financial Services VettaFl  Envestnet iPipeline Jackson Progyny Voya Financial  Ficomm Partners Idea Decanter Intention.ly Snappy Kraken  Haven Tower Group Keramas Vocatus	Asset Allocation Interactive Tool  Retirement Income Literacy Study  Expanded Research Offerings  Envestnet - Access to Annuities via the Insurance Exchange  Annuity Status Tracker  Registered Index-Linked Annuity (RILA) Digital Ecosystem  Women's Health Benefits  Connected Workplace Experiences  Wealth is a Woman's World Campaign  Membership Magnet  Advisor Brand Builder  Behavior Gap Audience Builder  Changing the Conversation on Race in Wealth Management  Active ETFs for Alternatives  RIA PR Campaign
INSURANCE WINNER  MARKETING   PR FIRMS  Digital Campaign of the Year  WINNER  PR Campaign of the Year  WINNER	Nasdaq Dorsey Wright Research Affiliates The American College of Financial Services VettaFl  Envestnet iPipeline Jackson Progyny Voya Financial  Ficomm Partners Idea Decanter Intention.ly Snappy Kraken  Haven Tower Group Keramas Vocatus	Asset Allocation Interactive Tool  Retirement Income Literacy Study  Expanded Research Offerings  Envestnet - Access to Annuities via the Insurance Exchange  Annuity Status Tracker  Registered Index-Linked Annuity (RILA) Digital Ecosystem  Women's Health Benefits  Connected Workplace Experiences  Wealth is a Woman's World Campaign  Membership Magnet  Advisor Brand Builder  Behavior Gap Audience Builder  Changing the Conversation on Race in Wealth Management  Active ETFs for Alternatives  RIA PR Campaign
INSURANCE WINNER  MARKETING   PR FIRMS  Digital Campaign of the Year  WINNER  PR Campaign of the Year  WINNER	Nasdaq Dorsey Wright Research Affiliates  The American College of Financial Services VettaFl  Envestnet iPipeline Jackson Progyny Voya Financial  Ficomm Partners Idea Decanter Intention.ly Snappy Kraken  Haven Tower Group Keramas Vocatus Water & Wall	Asset Allocation Interactive Tool  Retirement Income Literacy Study  Expanded Research Offerings  Envestnet - Access to Annuities via the Insurance Exchange  Annuity Status Tracker  Registered Index-Linked Annuity (RILA) Digital Ecosystem  Women's Health Benefits  Connected Workplace Experiences  Wealth is a Woman's World Campaign  Membership Magnet  Advisor Brand Builder  Behavior Gap Audience Builder  Changing the Conversation on Race in Wealth Management  Active ETFs for Alternatives  RIA PR Campaign  The Role of Earned Media
INSURANCE WINNER  MARKETING   PR FIRMS  Digital Campaign of the Year  WINNER  PR Campaign of the Year  WINNER  PHILANTHROPY	Nasdaq Dorsey Wright Research Affiliates The American College of Financial Services VettaFl  Envestnet iPipeline Jackson Progyny Voya Financial  Ficomm Partners Idea Decanter Intention.ly Snappy Kraken  Haven Tower Group Keramas Vocatus Water & Wall  Daylight Advisors	Asset Allocation Interactive Tool  Retirement Income Literacy Study  Expanded Research Offerings  Envestnet - Access to Annuities via the Insurance Exchange  Annuity Status Tracker  Registered Index-Linked Annuity (RILA) Digital Ecosystem  Women's Health Benefits  Connected Workplace Experiences  Wealth is a Woman's World Campaign  Membership Magnet  Advisor Brand Builder  Behavior Gap Audience Builder  Changing the Conversation on Race in Wealth Management  Active ETFs for Alternatives  RIA PR Campaign  The Role of Earned Media  Delivering Impact Strategies
INSURANCE WINNER  MARKETING   PR FIRMS  Digital Campaign of the Year  WINNER  PR Campaign of the Year  WINNER  PHILANTHROPY	Nasdaq Dorsey Wright Research Affiliates  The American College of Financial Services VettaFl  Envestnet iPipeline Jackson Progyny Voya Financial  Ficomm Partners Idea Decanter Intention.ly Snappy Kraken  Haven Tower Group  Keramas Vocatus Water & Wall  Daylight Advisors Foundation Source	Nasdaq Dorsey Wright Podcast Asset Allocation Interactive Tool  Retirement Income Literacy Study  Expanded Research Offerings  Envestnet - Access to Annuities via the Insurance Exchange Annuity Status Tracker Registered Index-Linked Annuity (RILA) Digital Ecosystem Women's Health Benefits Connected Workplace Experiences  Wealth is a Woman's World Campaign Membership Magnet Advisor Brand Builder  Behavior Gap Audience Builder  Changing the Conversation on Race in Wealth Management Active ETFs for Alternatives RIA PR Campaign The Role of Earned Media  Delivering Impact Strategies  Client Meeting Kit
INSURANCE WINNER  MARKETING   PR FIRMS Digital Campaign of the Year  WINNER  PR Campaign of the Year  WINNER  PHILANTHROPY  WINNER	Nasdaq Dorsey Wright Research Affiliates  The American College of Financial Services VettaFl  Envestnet iPipeline Jackson Progyny Voya Financial  Ficomm Partners Idea Decanter Intention.ly Snappy Kraken  Haven Tower Group  Keramas Vocatus Water & Wall  Daylight Advisors Foundation Source	Nasdaq Dorsey Wright Podcast Asset Allocation Interactive Tool  Retirement Income Literacy Study  Expanded Research Offerings  Envestnet - Access to Annuities via the Insurance Exchange Annuity Status Tracker Registered Index-Linked Annuity (RILA) Digital Ecosystem Women's Health Benefits Connected Workplace Experiences  Wealth is a Woman's World Campaign Membership Magnet Advisor Brand Builder  Behavior Gap Audience Builder  Changing the Conversation on Race in Wealth Management Active ETFs for Alternatives RIA PR Campaign The Role of Earned Media  Delivering Impact Strategies  Client Meeting Kit
INSURANCE WINNER  MARKETING   PR FIRMS Digital Campaign of the Year  WINNER  PR Campaign of the Year  WINNER  PHILANTHROPY  WINNER	Nasdaq Dorsey Wright Research Affiliates The American College of Financial Services VettaFI  Envestnet iPipeline Jackson Progyny Voya Financial  Ficomm Partners Idea Decanter Intention.ly Snappy Kraken  Haven Tower Group Keramas Vocatus Water & Wall  Daylight Advisors Foundation Source TIFIN Give	Asset Allocation Interactive Tool  Retirement Income Literacy Study  Expanded Research Offerings  Envestnet - Access to Annuities via the Insurance Exchange  Annuity Status Tracker  Registered Index-Linked Annuity (RILA) Digital Ecosystem  Women's Health Benefits  Connected Workplace Experiences  Wealth is a Woman's World Campaign  Membership Magnet  Advisor Brand Builder  Behavior Gap Audience Builder  Changing the Conversation on Race in Wealth Management  Active ETFs for Alternatives  RIA PR Campaign  The Role of Earned Media  Delivering Impact Strategies  Client Meeting Kit  Al-Powered Digital Philanthropy Platform
INSURANCE WINNER  MARKETING   PR FIRMS  Digital Campaign of the Year  WINNER  PR Campaign of the Year  WINNER  PHILANTHROPY  WINNER  RETIREMENT INCOME	Nasdaq Dorsey Wright Research Affiliates The American College of Financial Services VettaFl  Envestnet iPipeline Jackson Progyny Voya Financial  Ficomm Partners Idea Decanter Intention.ly Snappy Kraken  Haven Tower Group Keramas Vocatus Water & Wall  Daylight Advisors Foundation Source TIFIN Give	Asset Allocation Interactive Tool  Retirement Income Literacy Study  Expanded Research Offerings  Envestnet - Access to Annuities via the Insurance Exchange  Annuity Status Tracker Registered Index-Linked Annuity (RILA) Digital Ecosystem  Women's Health Benefits Connected Workplace Experiences  Wealth is a Woman's World Campaign Membership Magnet Advisor Brand Builder  Behavior Gap Audience Builder  Changing the Conversation on Race in Wealth Management Active ETFs for Alternatives RIA PR Campaign The Role of Earned Media  Delivering Impact Strategies  Client Meeting Kit Al-Powered Digital Philanthropy Platform
INSURANCE WINNER  MARKETING   PR FIRMS Digital Campaign of the Year  WINNER  PR Campaign of the Year  WINNER  PHILANTHROPY  WINNER  RETIREMENT INCOME  RETIREMENT PLAN SUPPORT AND	Nasdaq Dorsey Wright Research Affiliates The American College of Financial Services VettaFI  Envestnet iPipeline Jackson Progyny Voya Financial  Ficomm Partners Idea Decanter Intention.ly Snappy Kraken  Haven Tower Group Keramas Vocatus Water & Wall  Daylight Advisors Foundation Source TIFIN Give  Osaic PIMCO	Nasdaq Dorsey Wright Podcast Asset Allocation Interactive Tool  Retirement Income Literacy Study  Expanded Research Offerings  Envestnet - Access to Annuities via the Insurance Exchange Annuity Status Tracker Registered Index-Linked Annuity (RILA) Digital Ecosystem Women's Health Benefits Connected Workplace Experiences  Wealth is a Woman's World Campaign Membership Magnet Advisor Brand Builder  Behavior Gap Audience Builder  Changing the Conversation on Race in Wealth Management Active ETFs for Alternatives RIA PR Campaign The Role of Earned Media  Delivering Impact Strategies  Client Meeting Kit Al-Powered Digital Philanthropy Platform  NextPhase  Retirement Income Model Portfolios
INSURANCE WINNER  MARKETING   PR FIRMS  Digital Campaign of the Year  WINNER  PR Campaign of the Year  WINNER  PHILANTHROPY  WINNER  RETIREMENT INCOME	Nasdaq Dorsey Wright Research Affiliates The American College of Financial Services VettaFI  Envestnet iPipeline Jackson Progyny Voya Financial  Ficomm Partners Idea Decanter Intention.ly Snappy Kraken  Haven Tower Group Keramas Vocatus Water & Wall  Daylight Advisors Foundation Source TIFIN Give  Osaic PIMCO	Nasdaq Dorsey Wright Podcast Asset Allocation Interactive Tool  Retirement Income Literacy Study  Expanded Research Offerings  Envestnet - Access to Annuities via the Insurance Exchange Annuity Status Tracker Registered Index-Linked Annuity (RILA) Digital Ecosystem Women's Health Benefits Connected Workplace Experiences  Wealth is a Woman's World Campaign Membership Magnet Advisor Brand Builder  Behavior Gap Audience Builder  Changing the Conversation on Race in Wealth Management Active ETFs for Alternatives RIA PR Campaign The Role of Earned Media  Delivering Impact Strategies  Client Meeting Kit Al-Powered Digital Philanthropy Platform  NextPhase  Retirement Income Model Portfolios

WINNED	John Heneral	Daytisinant Fusassant Bus
WINNER	John Hancock LeafHouse	Participant Engagement Program  Personalized Plan Income Portfolio Technology
	Pontera	Third-party Technology Integrations
	Strategic Retirement Partners	Investment Process and Client Automation
	Strategie Netheriera artifers	investment i rocess and elicite Automation
401(k)Technology	Envestnet	Retire Complete
-	LeafHouse	Personalized Plan Income Portfolio Technology
WINNER	Pontera	Third-party Technology Integrations
	Vestwell	Record-keeping Platform Enhancements
	Voya Financial	myVoyage
Aggregators > CEO of the Year	Alera Group	Christian Mango, EVP and National Retirement
	HUB Retirement and Private	Practice Leader
WINNER	Wealth	Joseph DeNoyior, President
	Marsh McLennan Agency	Craig Reid, President and National Practice Leader,
	Marsh McLennan Agency	Retirement and Wealth
	Strategic Retirement Partners	Jeff Cullen, CEO
Bushay Danlays Wanith and Datiyamant	Cambridge Investment Decearch	
Broker-Dealers - Wealth and Retirement Integration	Cambridge Investment Research, Inc.	Retirement Plan Advisors Service
WINNER	Osaic	Generation (k)ultivate
	Raymond James	Retirement Plan Advisors and HR Industry Collaboration
		Collabol attori
DCIO Providers > Advisor Value Added	Franklin Templeton	Voice of the American Workplace
Programs	Morningstar Retirement,	
WINNER	Morningstar Investment	Personalized Managed IRAs
	Management Nuveen Investments	Lifetime Income Solutions in Target Date Funds
	Nuveen investments	Lifetime income solutions in rarget Date runus
In-plan Retirement Income - Product or	401(k) Annuity Hub	Market Intelligence Service
Service	Allianz Life Insurance Company of	warket intelligence Service
	North America	Lifetime Income+ Annuity
	iJoin	Retirement Income Marketplace
WINNER	Income America	In-plan Guaranteed Retirement Income
	LeafHouse	Personalized Plan Income Portfolio Technology
	Nuveen Investments	Lifetime Income Solutions in Target Date Funds
Pacard Kaanars > Cornorata Loadar of	Nuveen Investments	Lifetime Income Solutions in Target Date Funds
	Nuveen Investments	Lifetime Income Solutions in Target Date Funds
the Year	Ascensus	David Musto, Chair and CEO
the Year		
the Year	<b>Ascensus</b> Empower	David Musto, Chair and CEO  Rich Linton, President and Chief Operating Officer  Teresa Hassara, SVP, Workplace Savings and
the Year	Ascensus Empower Principal Financial Group	David Musto, Chair and CEO  Rich Linton, President and Chief Operating Officer  Teresa Hassara, SVP, Workplace Savings and Retirement Solutions
the Year	<b>Ascensus</b> Empower	David Musto, Chair and CEO  Rich Linton, President and Chief Operating Officer  Teresa Hassara, SVP, Workplace Savings and
the Year WINNER	Ascensus Empower Principal Financial Group Vestwell	David Musto, Chair and CEO Rich Linton, President and Chief Operating Officer Teresa Hassara, SVP, Workplace Savings and Retirement Solutions Aaron Schumm, Founder and CEO
the Year  WINNER  Record Keepers > Retirement Plan	Ascensus Empower Principal Financial Group	David Musto, Chair and CEO  Rich Linton, President and Chief Operating Officer  Teresa Hassara, SVP, Workplace Savings and Retirement Solutions
the Year  WINNER  Record Keepers > Retirement Plan	Ascensus Empower Principal Financial Group Vestwell 401GO Ascensus	David Musto, Chair and CEO  Rich Linton, President and Chief Operating Officer  Teresa Hassara, SVP, Workplace Savings and Retirement Solutions  Aaron Schumm, Founder and CEO  Bundled Record Keeping Platform  Pooled Employer Plan Adoption Campaign
the Year  WINNER  Record Keepers > Retirement Plan	Ascensus Empower Principal Financial Group Vestwell 401GO Ascensus Empower	David Musto, Chair and CEO  Rich Linton, President and Chief Operating Officer  Teresa Hassara, SVP, Workplace Savings and Retirement Solutions  Aaron Schumm, Founder and CEO  Bundled Record Keeping Platform  Pooled Employer Plan Adoption Campaign  Proposal System
the Year  WINNER  Record Keepers > Retirement Plan	Ascensus Empower Principal Financial Group Vestwell  401GO Ascensus Empower John Hancock	David Musto, Chair and CEO  Rich Linton, President and Chief Operating Officer  Teresa Hassara, SVP, Workplace Savings and Retirement Solutions  Aaron Schumm, Founder and CEO  Bundled Record Keeping Platform  Pooled Employer Plan Adoption Campaign  Proposal System  State of the Participant Campaign
winner  Record Keepers > Retirement Plan Advisor Support	Ascensus Empower Principal Financial Group Vestwell  401GO Ascensus Empower John Hancock T. Rowe Price	David Musto, Chair and CEO Rich Linton, President and Chief Operating Officer Teresa Hassara, SVP, Workplace Savings and Retirement Solutions Aaron Schumm, Founder and CEO  Bundled Record Keeping Platform Pooled Employer Plan Adoption Campaign Proposal System State of the Participant Campaign Financial Wellness Confidence Builder
the Year  WINNER  Record Keepers > Retirement Plan Advisor Support  WINNER	Ascensus Empower Principal Financial Group Vestwell  401GO Ascensus Empower John Hancock	David Musto, Chair and CEO  Rich Linton, President and Chief Operating Officer  Teresa Hassara, SVP, Workplace Savings and Retirement Solutions  Aaron Schumm, Founder and CEO  Bundled Record Keeping Platform  Pooled Employer Plan Adoption Campaign  Proposal System  State of the Participant Campaign
WINNER  Record Keepers > Retirement Plan Advisor Support  WINNER  SUCCESSION/OWNERSHIP TRANSITION SERVICES - NON-CUSTODIAN/BROKER-	Ascensus Empower Principal Financial Group Vestwell  401GO Ascensus Empower John Hancock T. Rowe Price	David Musto, Chair and CEO Rich Linton, President and Chief Operating Officer Teresa Hassara, SVP, Workplace Savings and Retirement Solutions Aaron Schumm, Founder and CEO  Bundled Record Keeping Platform Pooled Employer Plan Adoption Campaign Proposal System State of the Participant Campaign Financial Wellness Confidence Builder
WINNER  Record Keepers > Retirement Plan Advisor Support  WINNER  SUCCESSION/OWNERSHIP TRANSITION SERVICES - NON-CUSTODIAN/BROKER-	Ascensus Empower Principal Financial Group Vestwell  401GO Ascensus Empower John Hancock T. Rowe Price Voya Financial	David Musto, Chair and CEO  Rich Linton, President and Chief Operating Officer Teresa Hassara, SVP, Workplace Savings and Retirement Solutions  Aaron Schumm, Founder and CEO  Bundled Record Keeping Platform  Pooled Employer Plan Adoption Campaign  Proposal System  State of the Participant Campaign  Financial Wellness Confidence Builder  Thrive Program
WINNER  Record Keepers > Retirement Plan Advisor Support  WINNER  SUCCESSION/OWNERSHIP TRANSITION SERVICES - NON-CUSTODIAN/BROKER- DEALER	Ascensus Empower Principal Financial Group Vestwell  401GO Ascensus Empower John Hancock T. Rowe Price Voya Financial  Advisor Legacy	David Musto, Chair and CEO  Rich Linton, President and Chief Operating Officer  Teresa Hassara, SVP, Workplace Savings and Retirement Solutions  Aaron Schumm, Founder and CEO  Bundled Record Keeping Platform  Pooled Employer Plan Adoption Campaign  Proposal System  State of the Participant Campaign  Financial Wellness Confidence Builder  Thrive Program  Building Equity for Nextgen Advisors
WINNER  Record Keepers > Retirement Plan Advisor Support  WINNER  SUCCESSION/OWNERSHIP TRANSITION SERVICES - NON-CUSTODIAN/BROKER-	Ascensus Empower Principal Financial Group Vestwell  401GO Ascensus Empower John Hancock T. Rowe Price Voya Financial  Advisor Legacy Bluespring Wealth Partners	David Musto, Chair and CEO Rich Linton, President and Chief Operating Officer Teresa Hassara, SVP, Workplace Savings and Retirement Solutions Aaron Schumm, Founder and CEO  Bundled Record Keeping Platform Pooled Employer Plan Adoption Campaign Proposal System State of the Participant Campaign Financial Wellness Confidence Builder Thrive Program  Building Equity for Nextgen Advisors Building for the Next Generation
WINNER  Record Keepers > Retirement Plan Advisor Support  WINNER  SUCCESSION/OWNERSHIP TRANSITION SERVICES - NON-CUSTODIAN/BROKER- DEALER	Ascensus Empower Principal Financial Group Vestwell  401GO Ascensus Empower John Hancock T. Rowe Price Voya Financial  Advisor Legacy Bluespring Wealth Partners Diamond Consultants	David Musto, Chair and CEO  Rich Linton, President and Chief Operating Officer Teresa Hassara, SVP, Workplace Savings and Retirement Solutions  Aaron Schumm, Founder and CEO  Bundled Record Keeping Platform  Pooled Employer Plan Adoption Campaign  Proposal System  State of the Participant Campaign  Financial Wellness Confidence Builder  Thrive Program  Building Equity for Nextgen Advisors  Building for the Next Generation  Diamond Podcast Series
WINNER  Record Keepers > Retirement Plan Advisor Support  WINNER  SUCCESSION/OWNERSHIP TRANSITION SERVICES - NON-CUSTODIAN/BROKER- DEALER  WINNER	Ascensus Empower Principal Financial Group Vestwell  401GO Ascensus Empower John Hancock T. Rowe Price Voya Financial  Advisor Legacy Bluespring Wealth Partners	David Musto, Chair and CEO Rich Linton, President and Chief Operating Officer Teresa Hassara, SVP, Workplace Savings and Retirement Solutions Aaron Schumm, Founder and CEO  Bundled Record Keeping Platform Pooled Employer Plan Adoption Campaign Proposal System State of the Participant Campaign Financial Wellness Confidence Builder Thrive Program  Building Equity for Nextgen Advisors Building for the Next Generation
TAMPs  Record Keepers > Retirement Plan Advisor Support  WINNER  SUCCESSION/OWNERSHIP TRANSITION SERVICES - NON-CUSTODIAN/BROKER- DEALER  TAMPS	Ascensus Empower Principal Financial Group Vestwell  401GO Ascensus Empower John Hancock T. Rowe Price Voya Financial  Advisor Legacy Bluespring Wealth Partners Diamond Consultants	David Musto, Chair and CEO Rich Linton, President and Chief Operating Officer Teresa Hassara, SVP, Workplace Savings and Retirement Solutions Aaron Schumm, Founder and CEO  Bundled Record Keeping Platform Pooled Employer Plan Adoption Campaign Proposal System State of the Participant Campaign Financial Wellness Confidence Builder Thrive Program  Building Equity for Nextgen Advisors Building for the Next Generation Diamond Podcast Series
TAMPs  WINNER  Record Keepers > Retirement Plan Advisor Support  WINNER  SUCCESSION/OWNERSHIP TRANSITION SERVICES - NON-CUSTODIAN/BROKER- DEALER  WINNER  TAMPS  Model Marketplaces	Ascensus Empower  Principal Financial Group  Vestwell  401GO  Ascensus Empower  John Hancock T. Rowe Price  Voya Financial  Advisor Legacy  Bluespring Wealth Partners  Diamond Consultants The AmeriFlex Group®  Adhesion Wealth Advisor Solutions  Advyzon Investment	David Musto, Chair and CEO Rich Linton, President and Chief Operating Officer Teresa Hassara, SVP, Workplace Savings and Retirement Solutions Aaron Schumm, Founder and CEO  Bundled Record Keeping Platform Pooled Employer Plan Adoption Campaign Proposal System State of the Participant Campaign Financial Wellness Confidence Builder Thrive Program  Building Equity for Nextgen Advisors Building for the Next Generation Diamond Podcast Series Growth Opportunities  Model Marketplace Manager Exchange
TAMPs  Record Keepers > Retirement Plan Advisor Support  WINNER  SUCCESSION/OWNERSHIP TRANSITION SERVICES - NON-CUSTODIAN/BROKER- DEALER  TAMPS	Ascensus Empower  Principal Financial Group  Vestwell  401GO  Ascensus Empower John Hancock T. Rowe Price  Voya Financial  Advisor Legacy  Bluespring Wealth Partners Diamond Consultants The AmeriFlex Group®  Adhesion Wealth Advisor Solutions  Advyzon Investment Management	David Musto, Chair and CEO Rich Linton, President and Chief Operating Officer Teresa Hassara, SVP, Workplace Savings and Retirement Solutions Aaron Schumm, Founder and CEO  Bundled Record Keeping Platform Pooled Employer Plan Adoption Campaign Proposal System State of the Participant Campaign Financial Wellness Confidence Builder Thrive Program  Building Equity for Nextgen Advisors Building for the Next Generation Diamond Podcast Series Growth Opportunities  Model Marketplace Manager Exchange Nucleus Model Marketplace
TAMPs  MINNER  Record Keepers > Retirement Plan Advisor Support  WINNER  SUCCESSION/OWNERSHIP TRANSITION SERVICES - NON-CUSTODIAN/BROKER- DEALER  WINNER  TAMPS  Model Marketplaces	Ascensus Empower  Principal Financial Group  Vestwell  401GO  Ascensus Empower  John Hancock T. Rowe Price  Voya Financial  Advisor Legacy  Bluespring Wealth Partners  Diamond Consultants The AmeriFlex Group®  Adhesion Wealth Advisor Solutions  Advyzon Investment  Management  GeoWealth	David Musto, Chair and CEO Rich Linton, President and Chief Operating Officer Teresa Hassara, SVP, Workplace Savings and Retirement Solutions Aaron Schumm, Founder and CEO  Bundled Record Keeping Platform Pooled Employer Plan Adoption Campaign Proposal System State of the Participant Campaign Financial Wellness Confidence Builder Thrive Program  Building Equity for Nextgen Advisors Building for the Next Generation Diamond Podcast Series Growth Opportunities  Model Marketplace Manager Exchange Nucleus Model Marketplace Curated Model Marketplace
TAMPs  MINNER  Record Keepers > Retirement Plan Advisor Support  WINNER  SUCCESSION/OWNERSHIP TRANSITION SERVICES - NON-CUSTODIAN/BROKER- DEALER  WINNER  TAMPS  Model Marketplaces	Ascensus Empower  Principal Financial Group  Vestwell  401GO  Ascensus Empower John Hancock T. Rowe Price  Voya Financial  Advisor Legacy  Bluespring Wealth Partners Diamond Consultants The AmeriFlex Group®  Adhesion Wealth Advisor Solutions  Advyzon Investment Management	David Musto, Chair and CEO Rich Linton, President and Chief Operating Officer Teresa Hassara, SVP, Workplace Savings and Retirement Solutions Aaron Schumm, Founder and CEO  Bundled Record Keeping Platform Pooled Employer Plan Adoption Campaign Proposal System State of the Participant Campaign Financial Wellness Confidence Builder Thrive Program  Building Equity for Nextgen Advisors Building for the Next Generation Diamond Podcast Series Growth Opportunities  Model Marketplace Manager Exchange Nucleus Model Marketplace
WINNER  Record Keepers > Retirement Plan Advisor Support  WINNER  SUCCESSION/OWNERSHIP TRANSITION SERVICES - NON-CUSTODIAN/BROKER- DEALER  WINNER  TAMPS  Model Marketplaces  WINNER	Ascensus Empower Principal Financial Group Vestwell  401GO Ascensus Empower John Hancock T. Rowe Price Voya Financial  Advisor Legacy Bluespring Wealth Partners Diamond Consultants The AmeriFlex Group®  Adhesion Wealth Advisor Solutions Advyzon Investment Management GeoWealth SMArtX Advisory Solutions	David Musto, Chair and CEO Rich Linton, President and Chief Operating Officer Teresa Hassara, SVP, Workplace Savings and Retirement Solutions Aaron Schumm, Founder and CEO  Bundled Record Keeping Platform Pooled Employer Plan Adoption Campaign Proposal System State of the Participant Campaign Financial Wellness Confidence Builder Thrive Program  Building Equity for Nextgen Advisors Building for the Next Generation Diamond Podcast Series Growth Opportunities  Model Marketplace Manager Exchange Nucleus Model Marketplace Curated Model Marketplace SMArtY Platform
WINNER  Record Keepers > Retirement Plan Advisor Support  WINNER  SUCCESSION/OWNERSHIP TRANSITION SERVICES - NON-CUSTODIAN/BROKER- DEALER  WINNER  TAMPS  Model Marketplaces  WINNER	Ascensus Empower  Principal Financial Group  Vestwell  401GO Ascensus Empower John Hancock T. Rowe Price  Voya Financial  Advisor Legacy Bluespring Wealth Partners Diamond Consultants The AmeriFlex Group®  Adhesion Wealth Advisor Solutions  Advyzon Investment Management GeoWealth SMArtX Advisory Solutions  Absolute Capital Management	David Musto, Chair and CEO Rich Linton, President and Chief Operating Officer Teresa Hassara, SVP, Workplace Savings and Retirement Solutions Aaron Schumm, Founder and CEO  Bundled Record Keeping Platform Pooled Employer Plan Adoption Campaign Proposal System State of the Participant Campaign Financial Wellness Confidence Builder Thrive Program  Building Equity for Nextgen Advisors Building for the Next Generation Diamond Podcast Series Growth Opportunities  Model Marketplace Manager Exchange  Nucleus Model Marketplace  Curated Model Marketplace  SMArty Platform  Pre-rollover Asset Management
the Year WINNER  Record Keepers > Retirement Plan Advisor Support  WINNER SUCCESSION/OWNERSHIP TRANSITION SERVICES - NON-CUSTODIAN/BROKER- DEALER  WINNER  TAMPS Model Marketplaces WINNER	Ascensus Empower Principal Financial Group Vestwell  401GO Ascensus Empower John Hancock T. Rowe Price Voya Financial  Advisor Legacy Bluespring Wealth Partners Diamond Consultants The AmeriFlex Group®  Adhesion Wealth Advisor Solutions Advyzon Investment Management GeoWealth SMArtX Advisory Solutions	David Musto, Chair and CEO Rich Linton, President and Chief Operating Officer Teresa Hassara, SVP, Workplace Savings and Retirement Solutions Aaron Schumm, Founder and CEO  Bundled Record Keeping Platform Pooled Employer Plan Adoption Campaign Proposal System State of the Participant Campaign Financial Wellness Confidence Builder Thrive Program  Building Equity for Nextgen Advisors Building for the Next Generation Diamond Podcast Series Growth Opportunities  Model Marketplace Manager Exchange Nucleus Model Marketplace Curated Model Marketplace SMArty Platform  Pre-rollover Asset Management Platform Launch
SUCCESSION/OWNERSHIP TRANSITION SERVICES - NON-CUSTODIAN/BROKER- DEALER  WINNER  TAMPS  Model Marketplaces	Ascensus Empower  Principal Financial Group  Vestwell  401GO  Ascensus Empower John Hancock T. Rowe Price  Voya Financial  Advisor Legacy  Bluespring Wealth Partners  Diamond Consultants The AmeriFlex Group®  Adhesion Wealth Advisor Solutions  Advyzon Investment Management  GeoWealth  SMArtX Advisory Solutions  Absolute Capital Management  Advyzon Investment Management	David Musto, Chair and CEO Rich Linton, President and Chief Operating Officer Teresa Hassara, SVP, Workplace Savings and Retirement Solutions Aaron Schumm, Founder and CEO  Bundled Record Keeping Platform Pooled Employer Plan Adoption Campaign Proposal System State of the Participant Campaign Financial Wellness Confidence Builder Thrive Program  Building Equity for Nextgen Advisors Building for the Next Generation Diamond Podcast Series Growth Opportunities  Model Marketplace Manager Exchange  Nucleus Model Marketplace  Curated Model Marketplace SMArty Platform  Pre-rollover Asset Management
the Year WINNER  Record Keepers > Retirement Plan Advisor Support  WINNER  SUCCESSION/OWNERSHIP TRANSITION SERVICES - NON-CUSTODIAN/BROKER- DEALER  WINNER  TAMPS  Model Marketplaces WINNER	Ascensus Empower Principal Financial Group Vestwell  401GO Ascensus Empower John Hancock T. Rowe Price Voya Financial  Advisor Legacy Bluespring Wealth Partners Diamond Consultants The AmeriFlex Group®  Adhesion Wealth Advisor Solutions Advyzon Investment Management GeoWealth SMArtX Advisory Solutions Absolute Capital Management Advyzon Investment Management Advyzon Investment Management Advyzon Investment Management Advyzon Investment Management	David Musto, Chair and CEO Rich Linton, President and Chief Operating Officer Teresa Hassara, SVP, Workplace Savings and Retirement Solutions Aaron Schumm, Founder and CEO  Bundled Record Keeping Platform Pooled Employer Plan Adoption Campaign Proposal System State of the Participant Campaign Financial Wellness Confidence Builder Thrive Program  Building Equity for Nextgen Advisors Building for the Next Generation Diamond Podcast Series Growth Opportunities  Model Marketplace Manager Exchange  Nucleus Model Marketplace  Curated Model Marketplace SMArty Platform  Pre-rollover Asset Management Platform Launch Tax Management Services

Asset-Map AssetBook AssetBook CAIS Catchlight iCapital Invent Snappy Kraken Vestwell Wealth.com Bill Capuzzi H. Adam Holt Marwa Zakharia Warwa Zakharia Warwa Zakharia Lawrence Calcano Wilbur Swan Lawrence Calcano Oleg Tishkevich Robert Sofia Aaron Schumm Rafael Loureiro	MAINIED	Orion Advisor Solutions	Redtail CRM Integration
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Account Aggregation  Future Cabital  Future Ca		Zoe Financial	Zoe Wealth Platform
WINNER  Sos Inlance Vision   Continue   Continue   Continue   Winner   Continue   Continue   Continue   Winner   Winter   Winner   Worth   W			
Winner  Wealth Access  Unified Finances Fortfolio Data  Alternative Investment Platforms  Allegmi Alle	Account Aggregation		· ·
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Artichange  CAS CAS Solutions Cance Intelligence Englebrook Englacom Energia com Energia c	Alternative Investment Platforms	Alkymi	Alternative Investment Document Processing
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Cance Intelligence Eaglebrook Eaglebrook Digital Asset SNA Platform Energia com Energia Com Energia Architect Foot Opto Investments SUBSCRIBE Artificial Intelligence Algorit Aphatheria Aphatheria Aphatheria Assettink Alphatheria Assettink Al Platform Aphatheria Assettink Al Platform Assettink Al Platform Duting Advisory Duting Advisory Acres Detailign Advisory Sora Finance Utability insights and Loan Pricing - Execution Willow Nework Women/NexCon Matching Platform  Business Support Systems   Workflow Automation Willow Remore Willow Nework Women/NexCon Matching Platform  Business Support Systems   Workflow Automation Willow Remore Willow Nework  Business Support Systems   Workflow Automation Willow Remore Business Support Systems   Workflow Automation Willow Remore Absolute Engagement Engagement Engine Bento Engine Bento Engine Bento Engine Cance Intelligence Cance Intelligence Laserfishe Generative Al-Powered Document Summarizatio Bill Em Nov  Cash Optimization Advisor Credit Exchange Cash Management Product  File Points  Cash Management Product  Cash Manag			
Eaglebrook Enega.com Energy.Aternatives Access Helix by HL Private Market Nangarion Helix by HL Private Market Nangarion Private Market Nangarion Opto Investments Private Investments Management Platform SUBSCRIFE Alternative Investments Management Platform Alternative Investments Management Platform Alternative Investment Management Platform Alternative Investment Operating System Artificial Intelligence Allymin Alpha Generative Al Solution Alphathena Al-Optimized Direct Indexing Associate Alphathena Associate Alphathena Associate			
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Chief Technology Officer of the Year  CAIS  Flourish  Josh Owen  WINNER  Orion  Mustapha Baassiri  SMArtX Advisory Solutions  Vanilla  Amjad Hussain	Chief Marketing Officer of the Year	Addepar  Apex Fintech Solutions  Asset-Map  AssetBook  CAIS  Catchlight iCapital Invent  Snappy Kraken  Vestwell  Wealth.com  Catchlight Flourish  Nitrogen	Eric Poirier  Bill Capuzzi H. Adam Holt Marwa Zakharia Matt Brown Wilbur Swan Lawrence Calcano Oleg Tishkevich Robert Sofia Aaron Schumm Rafael Loureiro  Daniel Gilmartin Abby Domine  Craig Clark
Flourish Josh Owen  WINNER Orion Mustapha Baassiri  SMArtX Advisory Solutions Aaron Wormus  Vanilla Amjad Hussain	Chief Marketing Officer of the Year	Addepar  Apex Fintech Solutions  Asset-Map  AssetBook  CAIS  Catchlight iCapital Invent  Snappy Kraken  Vestwell  Wealth.com  Catchlight Flourish  Nitrogen  Snappy Kraken	Eric Poirier  Bill Capuzzi H. Adam Holt Marwa Zakharia Matt Brown Wilbur Swan Lawrence Calcano Oleg Tishkevich Robert Sofia Aaron Schumm Rafael Loureiro  Daniel Gilmartin Abby Domine  Craig Clark Angel Gonzalez
Flourish Josh Owen  WINNER Orion Mustapha Baassiri  SMArtX Advisory Solutions Aaron Wormus  Vanilla Amjad Hussain	Chief Marketing Officer of the Year	Addepar  Apex Fintech Solutions  Asset-Map  AssetBook  CAIS  Catchlight iCapital Invent  Snappy Kraken  Vestwell  Wealth.com  Catchlight Flourish  Nitrogen  Snappy Kraken	Eric Poirier  Bill Capuzzi H. Adam Holt Marwa Zakharia Matt Brown Wilbur Swan Lawrence Calcano Oleg Tishkevich Robert Sofia Aaron Schumm Rafael Loureiro  Daniel Gilmartin Abby Domine  Craig Clark Angel Gonzalez
WINNER Orion Mustapha Baassiri  SMArtX Advisory Solutions Aaron Wormus  Vanilla Amjad Hussain	Chief Marketing Officer of the Year WINNER	Addepar  Apex Fintech Solutions  Asset-Map  AssetBook  CAIS  Catchlight iCapital Invent  Snappy Kraken  Vestwell  Wealth.com  Catchlight Flourish  Nitrogen  Snappy Kraken  Vanilla	Eric Poirier  Bill Capuzzi H. Adam Holt Marwa Zakharia Matt Brown Wilbur Swan Lawrence Calcano Oleg Tishkevich Robert Sofia Aaron Schumm Rafael Loureiro  Daniel Gilmartin Abby Domine  Craig Clark Angel Gonzalez Jim Sinai
SMArtX Advisory Solutions Aaron Wormus  Vanilla Amjad Hussain	WINNER  Chief Marketing Officer of the Year  WINNER	Addepar  Apex Fintech Solutions  Asset-Map  AssetBook  CAIS  Catchlight iCapital Invent  Snappy Kraken  Vestwell  Wealth.com  Catchlight Flourish  Nitrogen  Snappy Kraken  Vanilla  CAIS	Eric Poirier  Bill Capuzzi H. Adam Holt Marwa Zakharia Matt Brown Wilbur Swan Lawrence Calcano Oleg Tishkevich Robert Sofia Aaron Schumm Rafael Loureiro  Daniel Gilmartin Abby Domine Craig Clark Angel Gonzalez Jim Sinai
Vanilla Amjad Hussain	Chief Marketing Officer of the Year  WINNER  Chief Technology Officer of the Year	Addepar  Apex Fintech Solutions  Asset-Map  AssetBook  CAIS  Catchlight iCapital Invent  Snappy Kraken  Vestwell  Wealth.com  Catchlight Flourish  Nitrogen  Snappy Kraken  Vanilla  CAIS  Flourish	Eric Poirier  Bill Capuzzi H. Adam Holt Marwa Zakharia Matt Brown Wilbur Swan Lawrence Calcano Oleg Tishkevich Robert Sofia Aaron Schumm Rafael Loureiro  Daniel Gilmartin Abby Domine Craig Clark Angel Gonzalez Jim Sinai Shane Williams Josh Owen
· ·	Chief Marketing Officer of the Year WINNER Chief Technology Officer of the Year	Addepar  Apex Fintech Solutions  Asset-Map AssetBook CAIS Catchlight iCapital Invent Snappy Kraken Vestwell Wealth.com  Catchlight Flourish Nitrogen Snappy Kraken Vanilla  CAIS Flourish Orion	Eric Poirier  Bill Capuzzi  H. Adam Holt  Marwa Zakharia  Matt Brown  Wilbur Swan  Lawrence Calcano  Oleg Tishkevich  Robert Sofia  Aaron Schumm  Rafael Loureiro  Daniel Gilmartin  Abby Domine  Craig Clark  Angel Gonzalez  Jim Sinai  Shane Williams  Josh Owen  Mustapha Baassiri
lient Onboarding / New Account	Chief Marketing Officer of the Year  WINNER  Chief Technology Officer of the Year	Addepar  Apex Fintech Solutions  Asset-Map  AssetBook  CAIS  Catchlight iCapital Invent Snappy Kraken Vestwell Wealth.com  Catchlight Flourish Nitrogen Snappy Kraken Vanilla  CAIS Flourish Orion SMArtX Advisory Solutions	Eric Poirier  Bill Capuzzi  H. Adam Holt  Marwa Zakharia  Matt Brown  Wilbur Swan  Lawrence Calcano  Oleg Tishkevich  Robert Sofia  Aaron Schumm  Rafael Loureiro  Daniel Gilmartin  Abby Domine  Craig Clark  Angel Gonzalez  Jim Sinai  Shane Williams  Josh Owen  Mustapha Baassiri  Aaron Wormus
	Chief Marketing Officer of the Year  WINNER  Chief Technology Officer of the Year	Addepar  Apex Fintech Solutions  Asset-Map  AssetBook  CAIS  Catchlight iCapital Invent Snappy Kraken Vestwell Wealth.com  Catchlight Flourish Nitrogen Snappy Kraken Vanilla  CAIS Flourish Orion SMArtX Advisory Solutions	Eric Poirier  Bill Capuzzi  H. Adam Holt  Marwa Zakharia  Matt Brown  Wilbur Swan  Lawrence Calcano  Oleg Tishkevich  Robert Sofia  Aaron Schumm  Rafael Loureiro  Daniel Gilmartin  Abby Domine  Craig Clark  Angel Gonzalez  Jim Sinai  Shane Williams  Josh Owen  Mustapha Baassiri  Aaron Wormus

WINNER	Advisor360°	Envestnet Integration
	Andes Wealth Technologies	"Smarting-up" Client Onboarding Platform
	Laserfiche	New Client Onboarding Solutions
	Quik!	30-second Onboarding
	X .	<b>0</b>
Client Portals	FactSet	Investment Dashboard
	SEI	New Investor Portal
	SS&C Black Diamond Wealth	Digital Engagement
	Platform	
WINNER	Summit Wealth Systems	Wealth Home
	Wealth Access	Unified Wealth and Digital Banking Platform
Compliance	InvestorCOM	AccountCompare
·	Laserfiche	Compliance Initiative
	Panoramix	Documents Expire
	Reflect	SEC's Names Rule Software
	RegVerse	Avery
	SIGNiX	Compliance Lock
	Smarsh	Platform Enhancements
WINNER	Testimonial iQ	Social Proof Platform
CRM	Interactive Brokers	Cash Management Program
WINNER	Orion	Redtail CRM Suite Sync
	Practifi	CRM Evolution
	SS&C Black Diamond Wealth Platform	Purpose-built CRM
	Platform	
Cyber Security	ID-Pal	ID-Detect
cyse: security	Sequretek	Security for Enterprises
WINNER	SIGNIX	Digital Signature Security
WHATER	SIGNA	Digital Signature Security
Digital Marketing Campaign of the Year		
WINNER	FMG	Holiday Advent Calendar Campaign
	intelliflo	Omnichannel Digital Campaign
	Nitrogen	Riskalyze to Nitrogen Rebrand
	Snappy Kraken	State of Digital Industry Report
	Zephyr	A to Zephyr
Direct Indexing	Alphathena	Al-Enhanced Direct Indexing
	Eaglebrook	Direct Indexing for Crypto
	IMTC	Fixed Income Direct Indexing
	Rowboat Advisors	"Non-armchair Direct Indexing" Education Series
WINNER	Vestmark	VAST
<b>D</b>	14 . 4 .	D Vi. li
Document Management	d1g1t FutureVault	Document Vault
	illuminote	Life Management Vault
		Digital Asset Registry and Clearinghouse  Generative Al-Powered Document
WINNER	Laserfiche	Summarization
	Prismm	Next-Gen Secure Document Vault
Estate Planning	EncorEstate Plans	Estate Planning Software
WINNER	FP Alpha	The Estate Lab
	Luminary	Estate Planning Software
	Trust & Will	Estate Planning Insights and Dashboard
	Vanilla	Estate Advisory Platform
	Wealth.com	Estate Planning Software
Financial Planning	Accot Man	Empowering Financial Planning Fundation
FILIALICIAL PIALININS	Asset-Map	Empowering Financial Planning Evolution  Multi-View in Decision Center
	eMoney Advisor	
WINNER	eMoney Advisor Orion	
	Orion	PulseCheck
WINNER		
	Orion  Assetlink	PulseCheck  Al Platform
WINNER	Orion	PulseCheck
WINNER Innovation New Applications	Orion  Assetlink Couplr Al Jump	PulseCheck  Al Platform  Client Acquisition Software
WINNER Innovation New Applications	Orion  Assetlink  Couplr Al	PulseCheck  Al Platform  Client Acquisition Software  Al Meeting Assistant  Key Features
WINNER Innovation New Applications	Orion  Assetlink Couplr Al Jump NEXA Insights	PulseCheck  Al Platform  Client Acquisition Software  Al Meeting Assistant
WINNER Innovation New Applications	Orion  Assetlink Couplr Al  Jump  NEXA Insights Sora Finance	PulseCheck  Al Platform  Client Acquisition Software  Al Meeting Assistant  Key Features  Liability Planning and Optimization Software
WINNER Innovation New Applications	Orion  Assetlink Couplr Al  Jump  NEXA Insights Sora Finance	PulseCheck  Al Platform Client Acquisition Software  Al Meeting Assistant Key Features Liability Planning and Optimization Software

	CAIS	CAIS Solutions
	Eaglebrook	Direct Indexing for Crypto
	Envestnet	Wealth Management Platform
	Foundation Source	PhilTech Platform
	illuminote	Digital Asset Registry and Clearinghouse
	Invent	SuperAPP Platform
	Shaping Wealth	Outsourced Chief Behavioral Officer
WINNER	Summit Wealth Systems	Client Experience Platform
	YCharts	YCharts Proposals
Marketing Automation	Broadridge Financial	AdvisorStream Salesforce App
WINNER	Catchlight	Al Driven Engagement and Lead Conversion
	Snappy Kraken	Marketing Hub
	Testimonial iQ	Unlocking the SEC Marketing Rule for Advisers
	Wealth Management GPT	Lead Gen and Client Engagement
Model Marketplaces		
WINNER	Adhesion Wealth Advisor Solutions	Model Marketplace Manager Exchange
	Charles River Development	Wealth Hub
	Kwanti	Model Marketplace and Model Portfolio Tracking
		,
Portfolio Analytics	AltExchange	AdvisorVue
WINNER	Kwanti	Portfolio Analytics Platform
	Opto Investments	Portfolio Analytics Suite
	Zephyr	Zephyr Spotlight on Asset Managers
		. , , , , , , , , , , , , , , , , , , ,
Portfolio Management, Accounting and		
Performance Reporting	Advyzon	Advyzon Conference
	Jacobi	Investment Technology for Asset Owners
WINNER	MyVest	Tax-Aware Portfolio Transitions
	Pontera	Third-party Technology Integrations
	SS&C Technologies	Aloha
	SSAC FEETINGIOGIES	710110
Rebalancing	Advyzon	Quantum Rebalancer
, and the second	Apex Fintech Solutions	AdvisorArch
	Helios	Customizable Rebalancing
WINNER	intelliflo	redblack Enhancements
Retirement Income	Broadridge Financial Solutions	Retirement Income Consortium
	IncomePath	Annuity Retirement Income Software
WINNER	MyVest	Income Discovery Partnership for Tax-optimized
VVIININER	Wyvest	Income in Retirement
	Panoramix	Contributions and Distributions Reporting
		Contributions and Distributions Reporting  Longevity Risk, Disability, and Long-Term Care
	Panoramix Voyant	Contributions and Distributions Reporting
	Voyant	Contributions and Distributions Reporting  Longevity Risk, Disability, and Long-Term Care Retirement Planning Solutions
Risk Tolerance / Client Profiling		Contributions and Distributions Reporting  Longevity Risk, Disability, and Long-Term Care Retirement Planning Solutions  Risk Tolerance/Client Profiling
Risk Tolerance / Client Profiling WINNER	Voyant	Contributions and Distributions Reporting  Longevity Risk, Disability, and Long-Term Care Retirement Planning Solutions  Risk Tolerance/Client Profiling
-	Voyant  Andes Wealth Technologies	Contributions and Distributions Reporting  Longevity Risk, Disability, and Long-Term Care Retirement Planning Solutions  Risk Tolerance/Client Profiling  Next-Generation Risk Questionnaire with Client
-	Voyant  Andes Wealth Technologies  Nitrogen	Contributions and Distributions Reporting  Longevity Risk, Disability, and Long-Term Care Retirement Planning Solutions  Risk Tolerance/Client Profiling  Next-Generation Risk Questionnaire with Client Check-ins
WINNER	Voyant  Andes Wealth Technologies  Nitrogen	Contributions and Distributions Reporting  Longevity Risk, Disability, and Long-Term Care Retirement Planning Solutions  Risk Tolerance/Client Profiling  Next-Generation Risk Questionnaire with Client Check-ins
WINNER Securities-based Lending	Voyant  Andes Wealth Technologies  Nitrogen	Contributions and Distributions Reporting  Longevity Risk, Disability, and Long-Term Care Retirement Planning Solutions  Risk Tolerance/Client Profiling  Next-Generation Risk Questionnaire with Client Check-ins
WINNER Securities-based Lending	Voyant  Andes Wealth Technologies  Nitrogen  Tolerisk	Contributions and Distributions Reporting  Longevity Risk, Disability, and Long-Term Care Retirement Planning Solutions  Risk Tolerance/Client Profiling  Next-Generation Risk Questionnaire with Client Check-ins  Portfolio Scoring and Risk Monitoring Tool
WINNER Securities-based Lending	Voyant  Andes Wealth Technologies  Nitrogen  Tolerisk  Advisor Credit Exchange	Contributions and Distributions Reporting  Longevity Risk, Disability, and Long-Term Care Retirement Planning Solutions  Risk Tolerance/Client Profiling  Next-Generation Risk Questionnaire with Client Check-ins  Portfolio Scoring and Risk Monitoring Tool  Advisor Credit Exchange Platform  Securities Lending Dashboard
WINNER  Securities-based Lending  WINNER	Voyant  Andes Wealth Technologies  Nitrogen  Tolerisk  Advisor Credit Exchange	Contributions and Distributions Reporting  Longevity Risk, Disability, and Long-Term Care Retirement Planning Solutions  Risk Tolerance/Client Profiling  Next-Generation Risk Questionnaire with Client Check-ins  Portfolio Scoring and Risk Monitoring Tool  Advisor Credit Exchange Platform  Securities Lending Dashboard  Asset-Map Updates Drive Future of Financial
WINNER  Securities-based Lending  WINNER	Voyant  Andes Wealth Technologies  Nitrogen  Tolerisk  Advisor Credit Exchange  Interactive Brokers  Asset-Map	Contributions and Distributions Reporting  Longevity Risk, Disability, and Long-Term Care Retirement Planning Solutions  Risk Tolerance/Client Profiling  Next-Generation Risk Questionnaire with Client Check-ins  Portfolio Scoring and Risk Monitoring Tool  Advisor Credit Exchange Platform  Securities Lending Dashboard  Asset-Map Updates Drive Future of Financial Planning
WINNER  Securities-based Lending  WINNER  Specialized Planning Applications	Voyant  Andes Wealth Technologies  Nitrogen  Tolerisk  Advisor Credit Exchange  Interactive Brokers  Asset-Map  Caribou	Contributions and Distributions Reporting  Longevity Risk, Disability, and Long-Term Care Retirement Planning Solutions  Risk Tolerance/Client Profiling  Next-Generation Risk Questionnaire with Client Check-ins  Portfolio Scoring and Risk Monitoring Tool  Advisor Credit Exchange Platform  Securities Lending Dashboard  Asset-Map Updates Drive Future of Financial Planning  Healthcare Planning Software
WINNER  Securities-based Lending  WINNER  Specialized Planning Applications	Voyant  Andes Wealth Technologies  Nitrogen  Tolerisk  Advisor Credit Exchange Interactive Brokers  Asset-Map  Caribou Charityvest	Contributions and Distributions Reporting  Longevity Risk, Disability, and Long-Term Care Retirement Planning Solutions  Risk Tolerance/Client Profiling  Next-Generation Risk Questionnaire with Client Check-ins  Portfolio Scoring and Risk Monitoring Tool  Advisor Credit Exchange Platform  Securities Lending Dashboard  Asset-Map Updates Drive Future of Financial Planning  Healthcare Planning Software  Custom-branded Donor-advised Fund
WINNER  Securities-based Lending  WINNER  Specialized Planning Applications	Voyant  Andes Wealth Technologies  Nitrogen  Tolerisk  Advisor Credit Exchange Interactive Brokers  Asset-Map  Caribou Charityvest Daffy	Contributions and Distributions Reporting  Longevity Risk, Disability, and Long-Term Care Retirement Planning Solutions  Risk Tolerance/Client Profiling  Next-Generation Risk Questionnaire with Client Check-ins  Portfolio Scoring and Risk Monitoring Tool  Advisor Credit Exchange Platform  Securities Lending Dashboard  Asset-Map Updates Drive Future of Financial Planning  Healthcare Planning Software  Custom-branded Donor-advised Fund  Donor-advised Fund Platform
WINNER  Securities-based Lending  WINNER  Specialized Planning Applications	Voyant  Andes Wealth Technologies  Nitrogen  Tolerisk  Advisor Credit Exchange Interactive Brokers  Asset-Map  Caribou Charityvest Daffy FP Alpha	Contributions and Distributions Reporting  Longevity Risk, Disability, and Long-Term Care Retirement Planning Solutions  Risk Tolerance/Client Profiling  Next-Generation Risk Questionnaire with Client Check-ins  Portfolio Scoring and Risk Monitoring Tool  Advisor Credit Exchange Platform  Securities Lending Dashboard  Asset-Map Updates Drive Future of Financial Planning  Healthcare Planning Software  Custom-branded Donor-advised Fund  Donor-advised Fund Platform  Roth Conversion Simulator
WINNER  Securities-based Lending  WINNER  Specialized Planning Applications	Voyant  Andes Wealth Technologies  Nitrogen  Tolerisk  Advisor Credit Exchange Interactive Brokers  Asset-Map  Caribou Charityvest Daffy FP Alpha Holistiplan	Contributions and Distributions Reporting  Longevity Risk, Disability, and Long-Term Care Retirement Planning Solutions  Risk Tolerance/Client Profiling  Next-Generation Risk Questionnaire with Client Check-ins  Portfolio Scoring and Risk Monitoring Tool  Advisor Credit Exchange Platform  Securities Lending Dashboard  Asset-Map Updates Drive Future of Financial Planning  Healthcare Planning Software  Custom-branded Donor-advised Fund  Donor-advised Fund Platform  Roth Conversion Simulator  Property and Casualty Tool
WINNER  Securities-based Lending  WINNER  Specialized Planning Applications	Voyant  Andes Wealth Technologies  Nitrogen  Tolerisk  Advisor Credit Exchange Interactive Brokers  Asset-Map  Caribou  Charityvest  Daffy  FP Alpha  Holistiplan  Sora Finance	Contributions and Distributions Reporting  Longevity Risk, Disability, and Long-Term Care Retirement Planning Solutions  Risk Tolerance/Client Profiling  Next-Generation Risk Questionnaire with Client Check-ins  Portfolio Scoring and Risk Monitoring Tool  Advisor Credit Exchange Platform  Securities Lending Dashboard  Asset-Map Updates Drive Future of Financial Planning  Healthcare Planning Software  Custom-branded Donor-advised Fund  Donor-advised Fund Platform  Roth Conversion Simulator  Property and Casualty Tool  Liability Planning and Optimization Software
WINNER  Securities-based Lending  WINNER  Specialized Planning Applications	Voyant  Andes Wealth Technologies  Nitrogen  Tolerisk  Advisor Credit Exchange Interactive Brokers  Asset-Map  Caribou Charityvest Daffy FP Alpha Holistiplan	Contributions and Distributions Reporting  Longevity Risk, Disability, and Long-Term Care Retirement Planning Solutions  Risk Tolerance/Client Profiling  Next-Generation Risk Questionnaire with Client Check-ins  Portfolio Scoring and Risk Monitoring Tool  Advisor Credit Exchange Platform  Securities Lending Dashboard  Asset-Map Updates Drive Future of Financial Planning  Healthcare Planning Software  Custom-branded Donor-advised Fund  Donor-advised Fund Platform  Roth Conversion Simulator  Property and Casualty Tool
WINNER  Securities-based Lending  WINNER  Specialized Planning Applications  WINNER	Voyant  Andes Wealth Technologies  Nitrogen  Tolerisk  Advisor Credit Exchange Interactive Brokers  Asset-Map  Caribou  Charityvest  Daffy  FP Alpha  Holistiplan  Sora Finance  Whealthcare Planning	Contributions and Distributions Reporting Longevity Risk, Disability, and Long-Term Care Retirement Planning Solutions  Risk Tolerance/Client Profiling  Next-Generation Risk Questionnaire with Client Check-ins  Portfolio Scoring and Risk Monitoring Tool  Advisor Credit Exchange Platform  Securities Lending Dashboard  Asset-Map Updates Drive Future of Financial Planning  Healthcare Planning Software  Custom-branded Donor-advised Fund  Donor-advised Fund Platform  Roth Conversion Simulator  Property and Casualty Tool  Liability Planning and Optimization Software  WhealthBot
WINNER  Securities-based Lending  WINNER  Specialized Planning Applications  WINNER	Voyant  Andes Wealth Technologies  Nitrogen  Tolerisk  Advisor Credit Exchange Interactive Brokers  Asset-Map  Caribou  Charityvest  Daffy  FP Alpha  Holistiplan  Sora Finance  Whealthcare Planning  AdvicePay	Contributions and Distributions Reporting Longevity Risk, Disability, and Long-Term Care Retirement Planning Solutions  Risk Tolerance/Client Profiling  Next-Generation Risk Questionnaire with Client Check-ins  Portfolio Scoring and Risk Monitoring Tool  Advisor Credit Exchange Platform  Securities Lending Dashboard  Asset-Map Updates Drive Future of Financial Planning  Healthcare Planning Software  Custom-branded Donor-advised Fund  Donor-advised Fund Platform  Roth Conversion Simulator  Property and Casualty Tool  Liability Planning and Optimization Software  WhealthBot  Fee-for-Service Industry Trend Report
WINNER  Securities-based Lending  WINNER  Specialized Planning Applications  WINNER  Thought Leadership	Voyant  Andes Wealth Technologies  Nitrogen  Tolerisk  Advisor Credit Exchange Interactive Brokers  Asset-Map  Caribou Charityvest Daffy FP Alpha Holistiplan Sora Finance Whealthcare Planning  AdvicePay Asset-Map	Contributions and Distributions Reporting Longevity Risk, Disability, and Long-Term Care Retirement Planning Solutions  Risk Tolerance/Client Profiling  Next-Generation Risk Questionnaire with Client Check-ins  Portfolio Scoring and Risk Monitoring Tool  Advisor Credit Exchange Platform  Securities Lending Dashboard  Asset-Map Updates Drive Future of Financial Planning  Healthcare Planning Software  Custom-branded Donor-advised Fund  Donor-advised Fund Platform  Roth Conversion Simulator  Property and Casualty Tool  Liability Planning and Optimization Software  WhealthBot  Fee-for-Service Industry Trend Report  AdviceTech.LIVE
WINNER  Securities-based Lending  WINNER  Specialized Planning Applications	Voyant  Andes Wealth Technologies  Nitrogen  Tolerisk  Advisor Credit Exchange Interactive Brokers  Asset-Map  Caribou Charityvest Daffy FP Alpha Holistiplan Sora Finance Whealthcare Planning  AdvicePay Asset-Map  Dynasty Financial Partners	Contributions and Distributions Reporting  Longevity Risk, Disability, and Long-Term Care Retirement Planning Solutions  Risk Tolerance/Client Profiling  Next-Generation Risk Questionnaire with Client Check-ins  Portfolio Scoring and Risk Monitoring Tool  Advisor Credit Exchange Platform  Securities Lending Dashboard  Asset-Map Updates Drive Future of Financial Planning  Healthcare Planning Software  Custom-branded Donor-advised Fund  Donor-advised Fund Platform  Roth Conversion Simulator  Property and Casualty Tool  Liability Planning and Optimization Software  WhealthBot  Fee-for-Service Industry Trend Report  AdviceTech.LIVE  Advisor to CEO Program
WINNER  Securities-based Lending WINNER  Specialized Planning Applications WINNER  Thought Leadership	Voyant  Andes Wealth Technologies  Nitrogen  Tolerisk  Advisor Credit Exchange Interactive Brokers  Asset-Map  Caribou Charityvest Daffy FP Alpha Holistiplan Sora Finance Whealthcare Planning  AdvicePay Asset-Map	Contributions and Distributions Reporting Longevity Risk, Disability, and Long-Term Care Retirement Planning Solutions  Risk Tolerance/Client Profiling  Next-Generation Risk Questionnaire with Client Check-ins  Portfolio Scoring and Risk Monitoring Tool  Advisor Credit Exchange Platform  Securities Lending Dashboard  Asset-Map Updates Drive Future of Financial Planning  Healthcare Planning Software  Custom-branded Donor-advised Fund  Donor-advised Fund Platform  Roth Conversion Simulator  Property and Casualty Tool  Liability Planning and Optimization Software  WhealthBot  Fee-for-Service Industry Trend Report  AdviceTech.LIVE

	Nitrogen	The Fearless Investing Summit
	Paychex	Financial Advisor Webinar Series
	Rethink Financial Advice	Rethink Podcast
	Shaping Wealth	Building the Behavioral Advisor
	Zephyr	A to Zephyr Podcast
Unified (All-In-One) Systems	Amplify Technology	Client Dashboard
WINNER	Envestnet	Wealth Management Ecosystem
	Orion	Orion Systems Integration
	Pershing X	Wove
	SS&C Black Diamond Wealth Platform	Platform Integrations
TRUSTS		
	Bank of America Private Bank	Accelerating the Client and Advisor Trust Acceptance Experience
	Fiduciary Trust of New England	New Hampshire Trust: Enhancing Accessibility
	Hallman & Associates, PC	Deferred Sales Trust
	SS&C Advent	Trust Suite
	The Private Trust Company, N.A. an affiliate of LPL Financial	Estate Settlement Service
	Wealth.com	Ester™



